PeopleSoft 8.9

Enterprise Learning
(Training Administration)

May 29, 2007

Setting Up a Session

Adding a Course Session

PeopleSoft's Training Administration has two components that are the foundation of all actions within the training process. **Courses** and **Sessions**, to some extent, are involved with every action within training administration.

Courses must be established first. A course may have several sessions active concurrently in PeopleSoft, but the sessions may not have identical details, such as time and facility. The date must be unique between sessions.

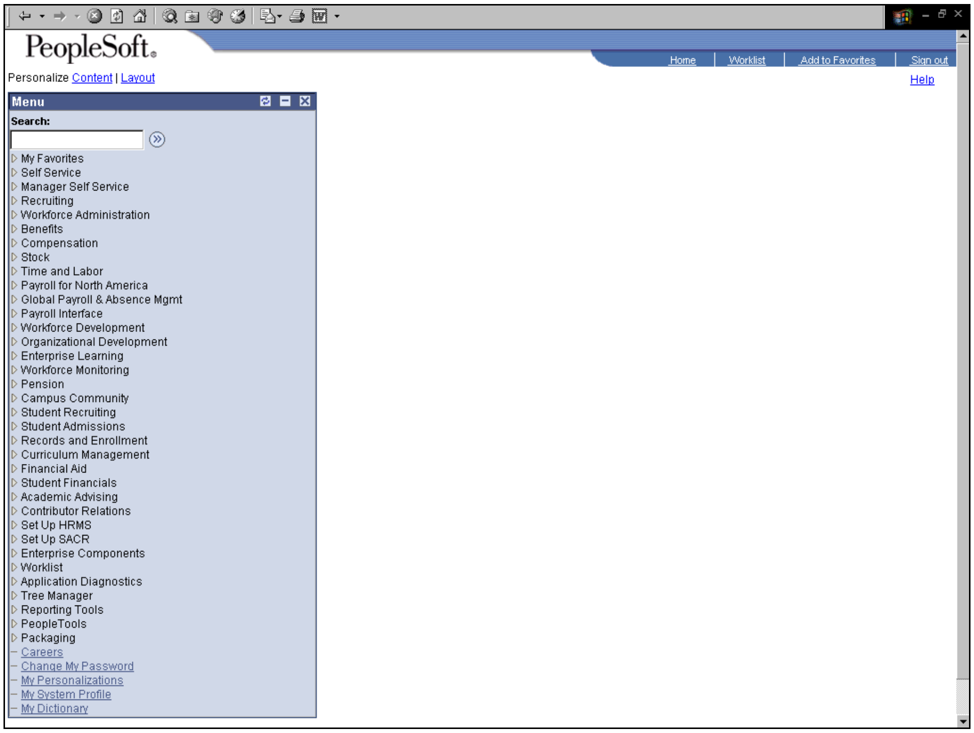
NOTE: To maintain consistency and avoid duplication, the State Personnel Department maintains the Course Table. Please utilize the Add A Course Form (Appendix A) to request new course codes.

This topic will explain how to add a session for an existing course. A course session can be set up only if the Course Table has an active entry. If your course has not been entered on the Course Table, contact the State Personnel Department's Training Division.

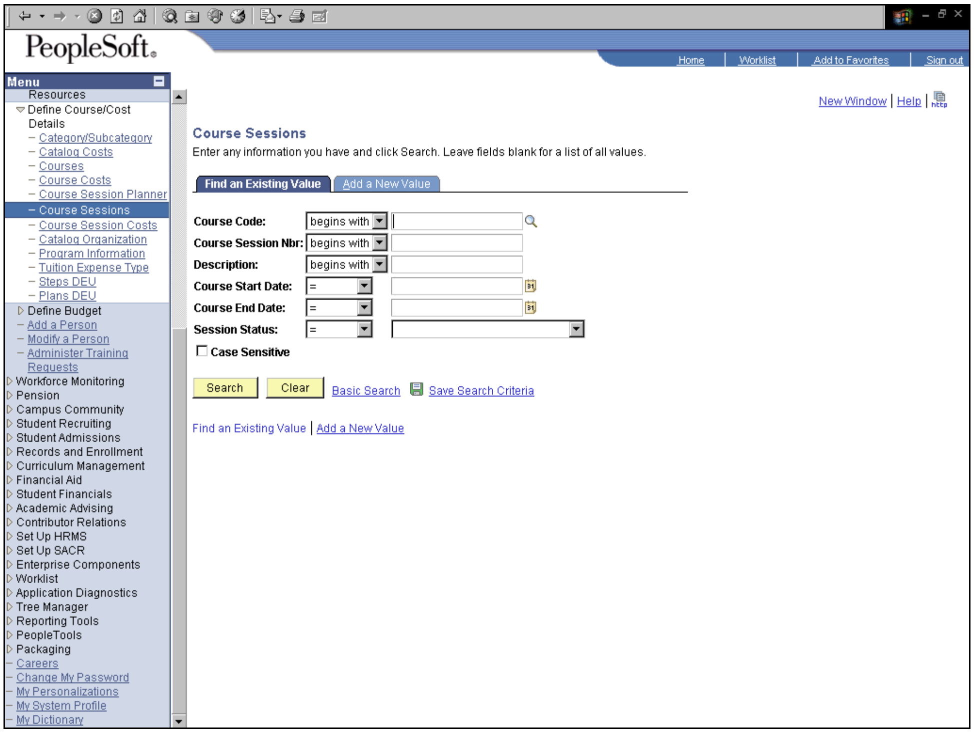
Procedure

In this topic, you will add a session for the Presentation Skills course (course code BSK001), and specify the session information in the PeopleSoft Human Resources application.

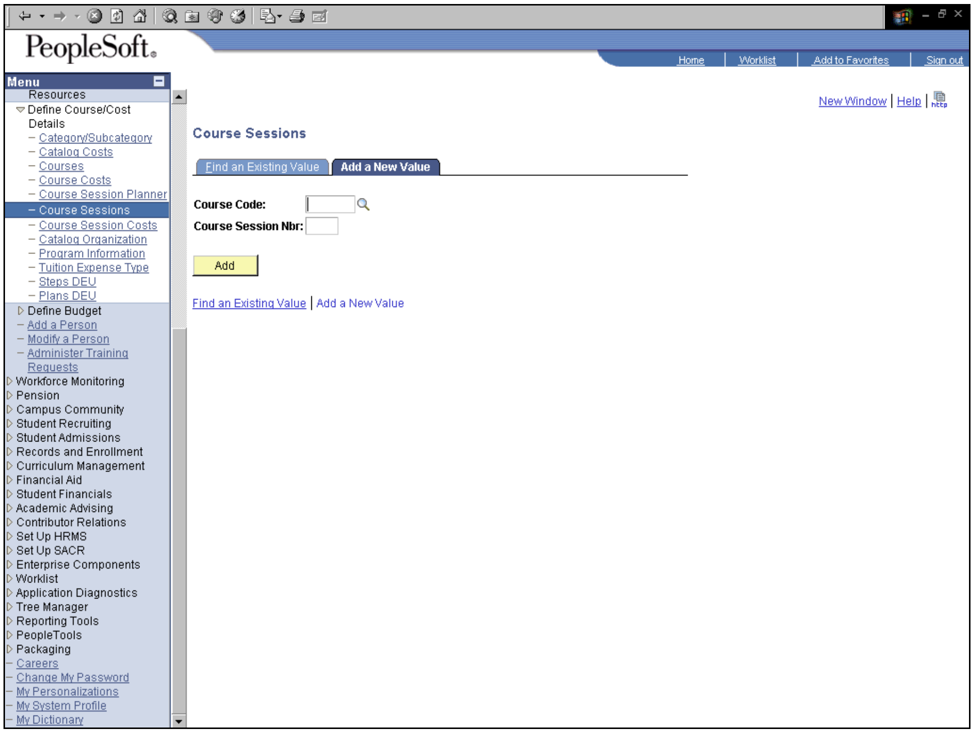
Procedure

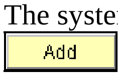


Step	Action
1.	Begin by navigating to the **Course Session Profile** page. Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Define Course/Cost Details** link.
3.	Click the **Course Sessions** link.



Step	Action
4.	Click the **Add a New Value** tab.



Step	Action
5.	Enter the desired information into the **Course Code** field. Example: "**BSK001**". If you do not know the course code, click on the magnifying glass to lookup the course codes.
6.	Click the **Add** button. **IMPORTANT:** Leave the Course Session Number Blank. The system will assign a sequential number when you save the record. 
7.	Use the **Course Session Profile** page to enter, update, or view a session status, date, time, and capacity.
8.	Specify the session status, such as Active, Canceled, or Complete in the **Session Status** field. To create a new session, accept the default status of **Active** for the **Session Status** field.

Course Session Profile Page (Fields Descriptions)

Session Status: Indicates whether the session is Active, Cancelled, or Complete. An Active value is appropriate for a new session. Otherwise you will not be able to enroll students.

Session Administration Box: Must be checked. Do not click in this box. Otherwise you will not be able to complete the scheduling.

Start/End Date/Times: (See next **Note Tip** for times and **Reschedule** information.)

Duration: The system populates this field from the Course Table. If the session duration is different from this default, update the Duration field.

Duration Unit Field: The system populates this field from the Course Table. This is the unit in which the Duration is being measured. If you want to use a different unit, select a Duration Unit from the available options.

Min. Students/Session: The system populates this from the Course Table. Update the minimum number of students in this field, if necessary.

Max. Students/Session: The system populates this field from the Course Table. Update the maximum number of students in this field, if necessary.

Language Field: This field is not used.

Vendor ID: Enter your Business Unit in this field, which is used for reporting purposes. If you do not know the number, use the lookup feature and select the appropriate number.

State/End Dates: Enter the start and end dates for the course session.

Start/End Times: Enter the start and end times of the course session.

Note: All times entered are assumed to be AM unless:

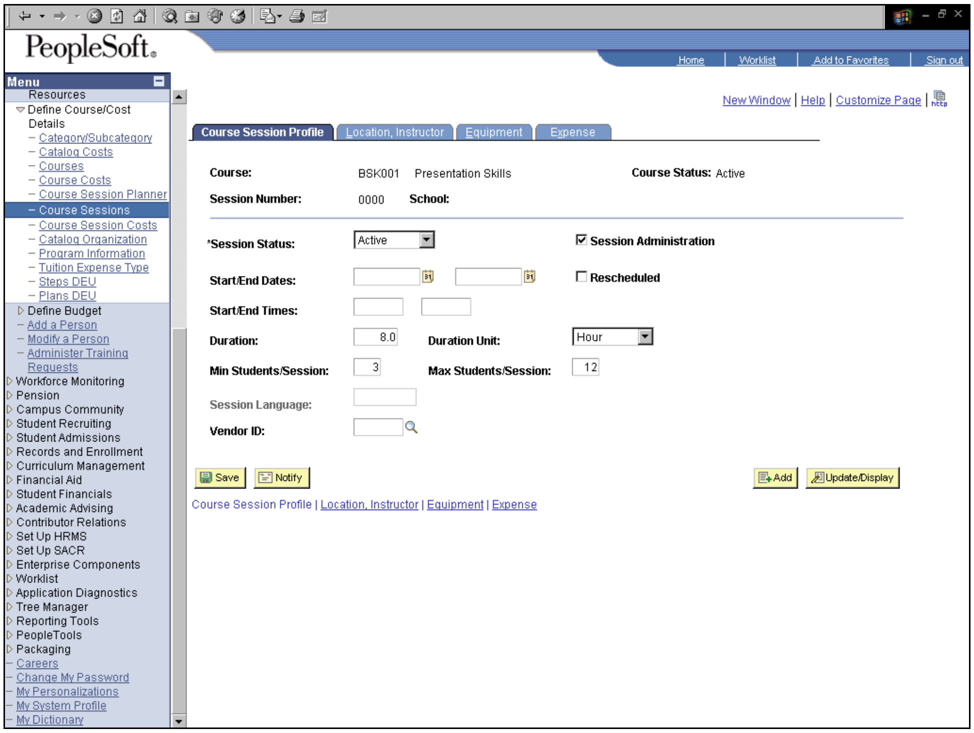
1. They are specified in Military Time format, for example **0900** becomes **9:00 am** and **1500** becomes **3:00 pm**.

2. You put a **p** after the time, for example **3p** becomes **3:00 pm** and **4:30p** becomes **4:30 pm.** These will translate after you type them and press the **tab key.**

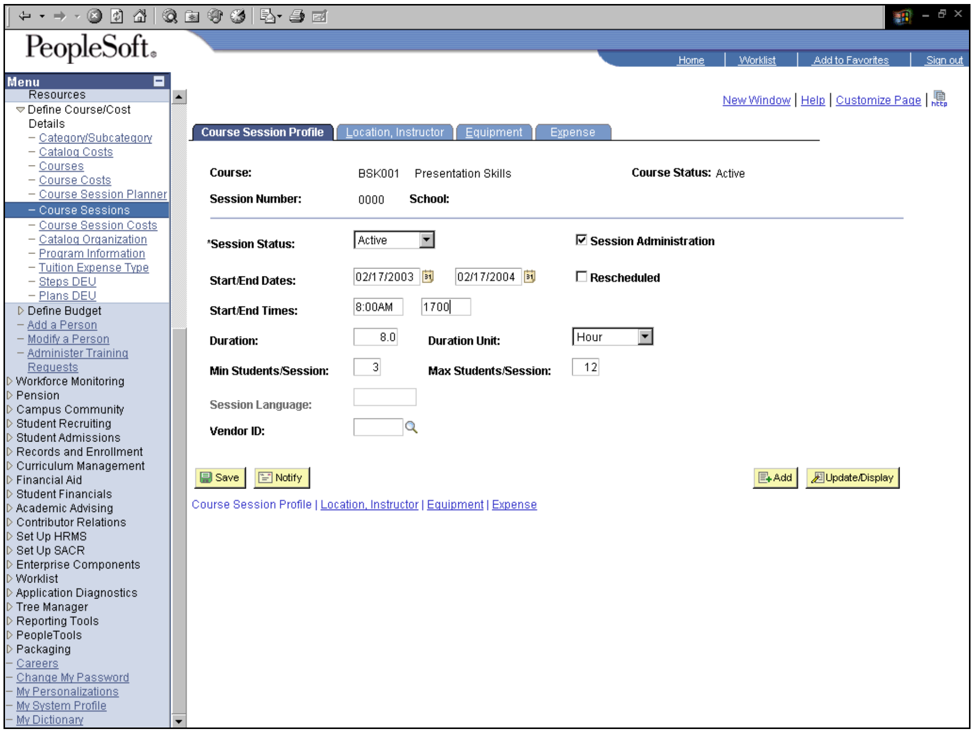
Reschedule Check Box: When entering a new session, leave this box blank.

Note: If you later change the Start/End Dates or Start/End Times, you will also need to click inside the Reschedule Box. When you change the dates for the session, the system automatically updates the dates in the Student Training Records of students on the waiting lists and enrolled in the course session. You must check the Reschedule Box to cause the updates to generate.

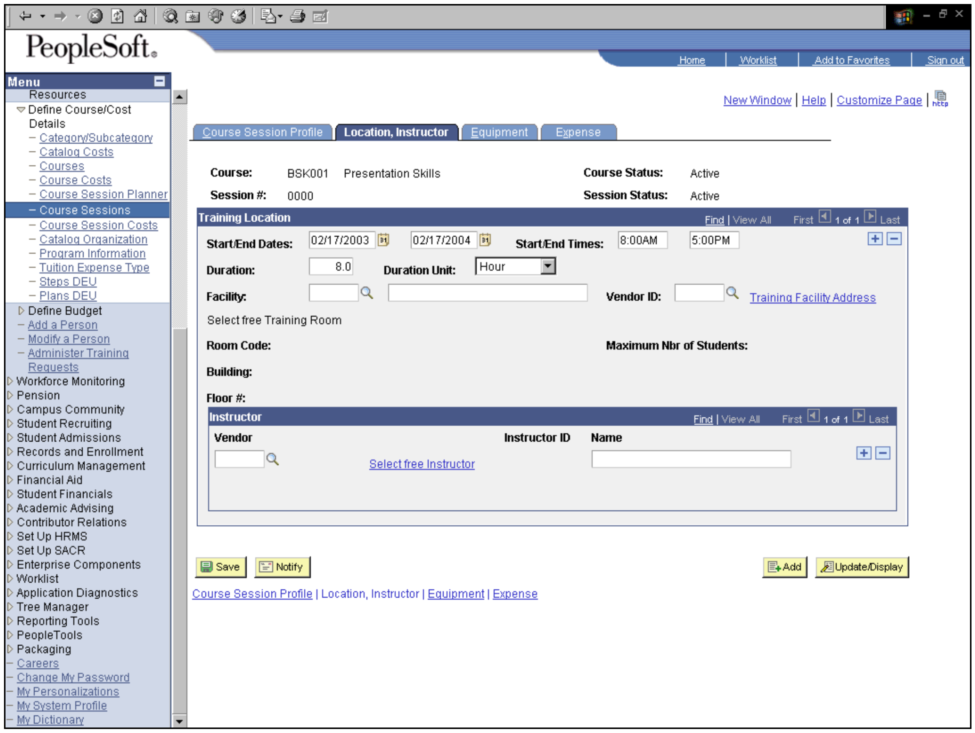
When you select the Rescheduled Check Box and save the page, the system changes the letter code in the student training record to RSC (rescheduled).



Step	Action
9.	Enter the desired information into the **Start Date** field. Example: "**02/17/2003**".
10.	Press the Tab key. 02/17/2003
11.	Enter the desired information into the **End Date** field. Example: "**02/17/2004**". (**Note:** The fact that the class start/end dates are not the same year appears to be a typo in the tutorial.)
12.	Press the Tab key**.** 02/17/2004
13.	Enter the desired information into the **Start Time** field. Example: "**0800**".
14.	Press the Tab key**.** 0800
15.	Enter the desired information into the **End Time** field. Example: "**1700**".

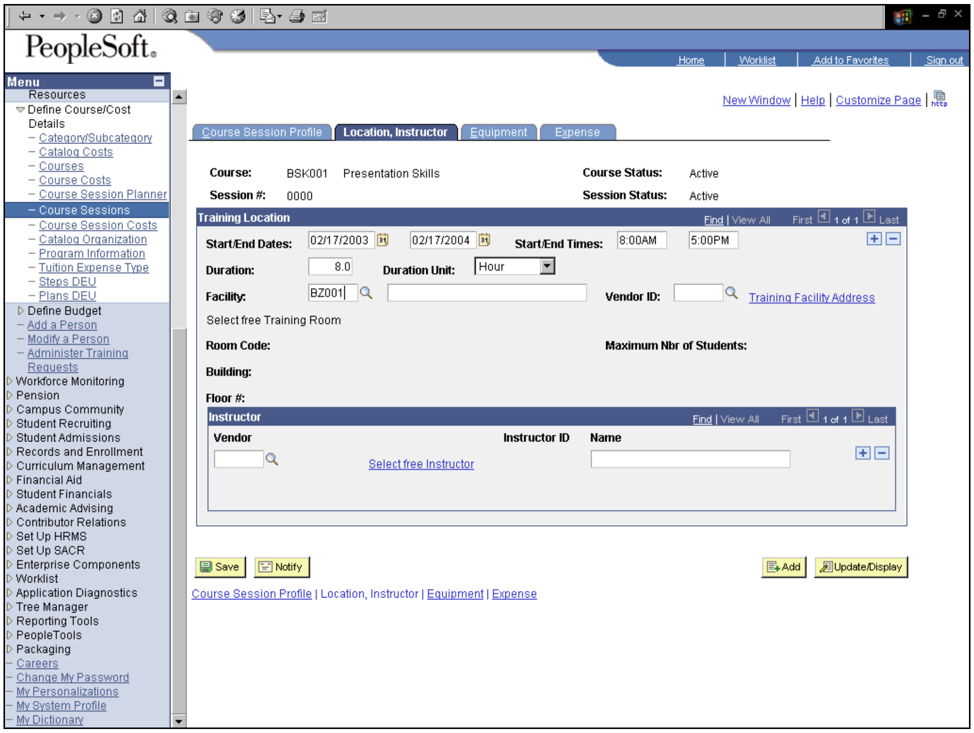


Step	Action
16.	Click the **Location, Instructor** tab.
17.	Use the **Location, Instructor** page to enter, update, or view information regarding the course session at the training facility.



Step	Action
18.	Specify a training facility code for this session in the **Facility** field. Enter the desired information into the **Facility** field. Example: "**BZ001**".

Add Instructor to the program.



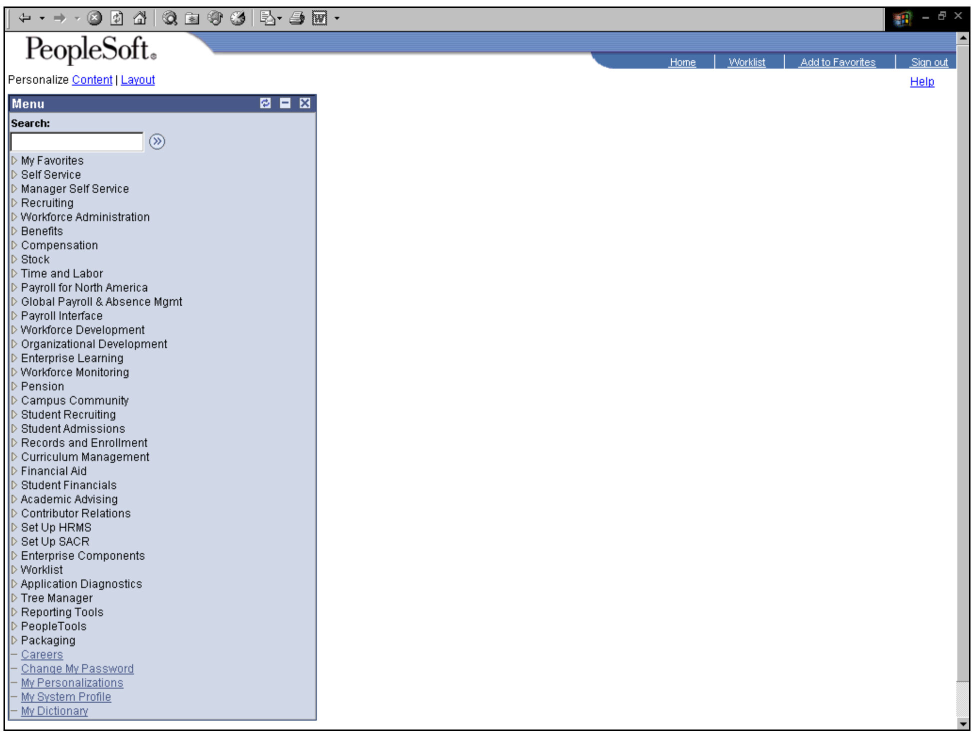
Step	Action
19.	Click the **Save** button. Save
20.	Notice that the session number has changed from **0000** to **0001**. This indicates that a session has been added to the Presentation Skills course. It was automatically assigned a number. In this case **0001**.
21.	You have successfully added a session for the Presentation Skills course. **End of Procedure.**

Adding an Instructor

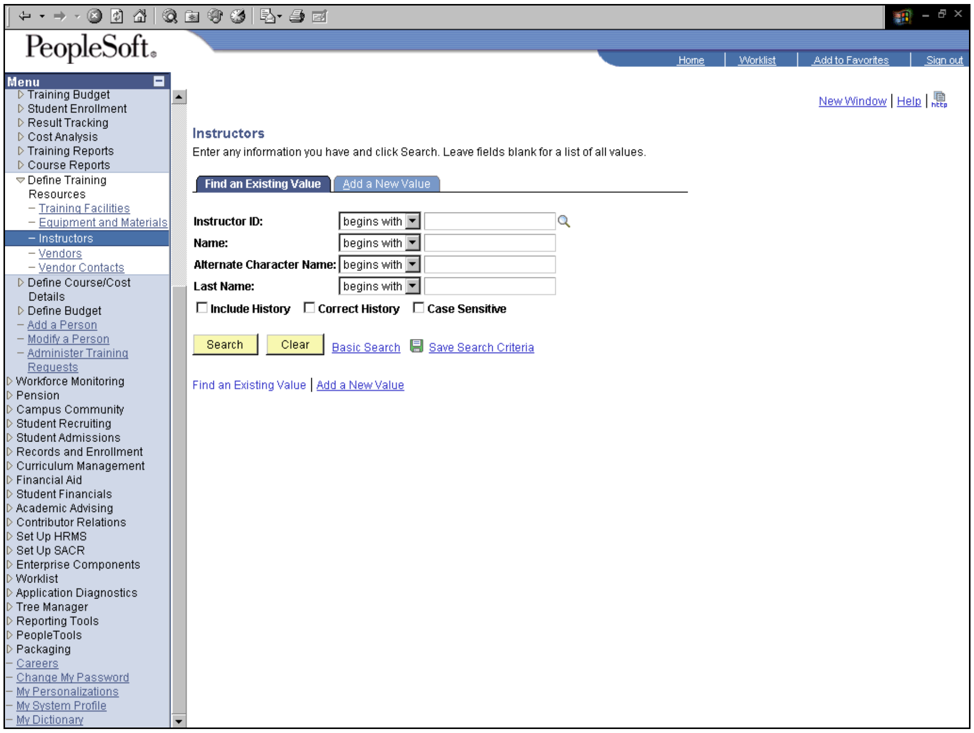
You need an instructor to lead a course. Instructors can be employees or non-employees. You cannot select instructors unless you specify that they are qualified to lead the course. You use the Instructor table to enter and update instructor information.

In this example, your company has developed a presentation course internally for employees. Luis Duarte, an employee in your company, is selected as the qualified instructor for this course. Your goal is to add Luis Duarte as an instructor into the system.

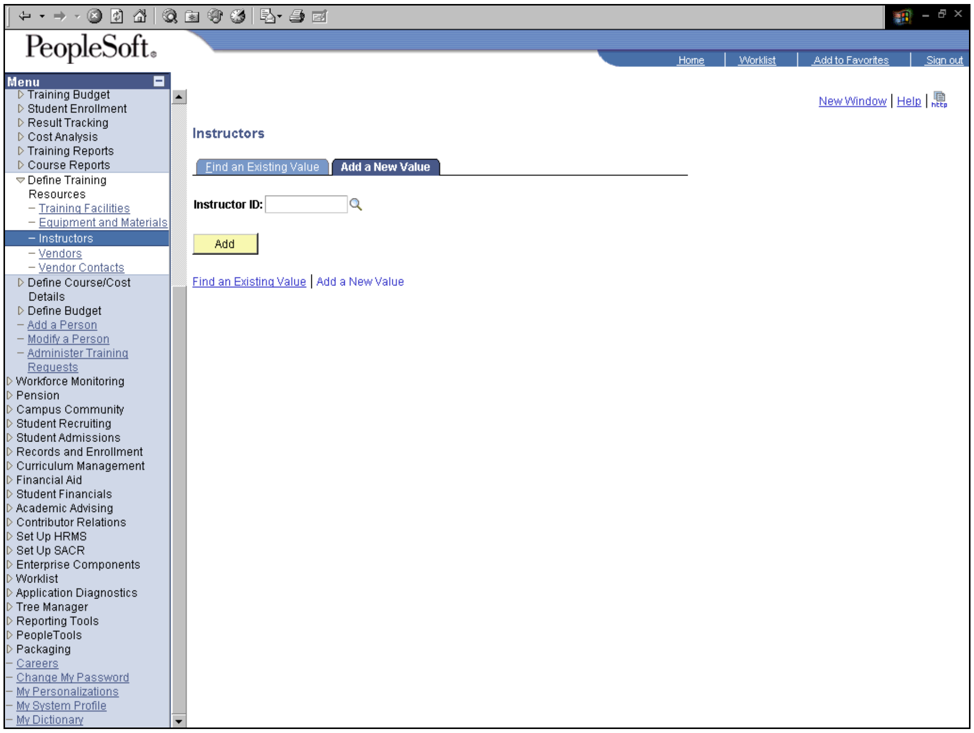
Procedure



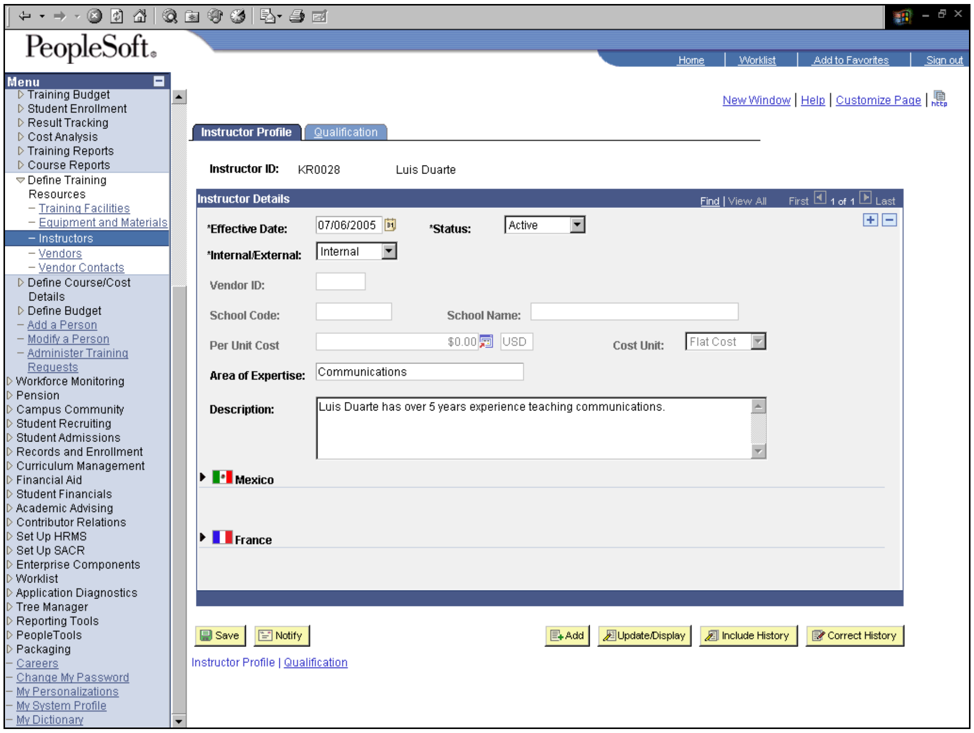
Step	Action
1.	Begin by navigating to the **Instructor Profile** page. Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Instructors** link under **Define Training Resources.** Instructors



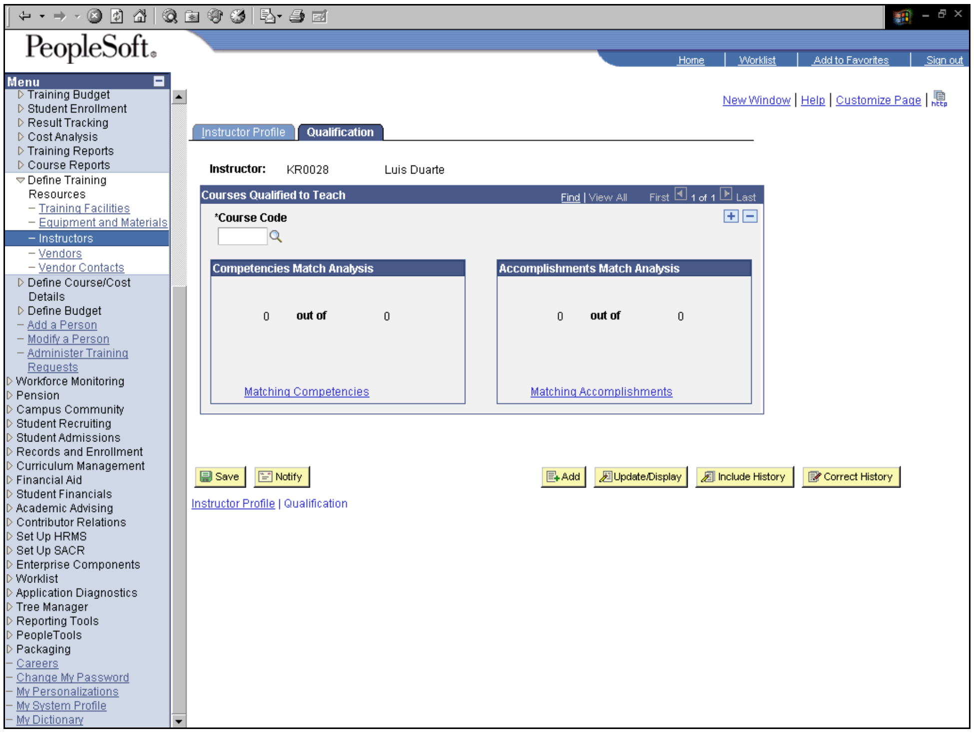
Step	Action
3.	Either **Find an Existing Value** (Person is already designated as an instructor in PeopleSoft), or **Add a New Value** (Designate a new person as an instructor.) We will designate a new instructor. Click the **Add a New Value** tab.



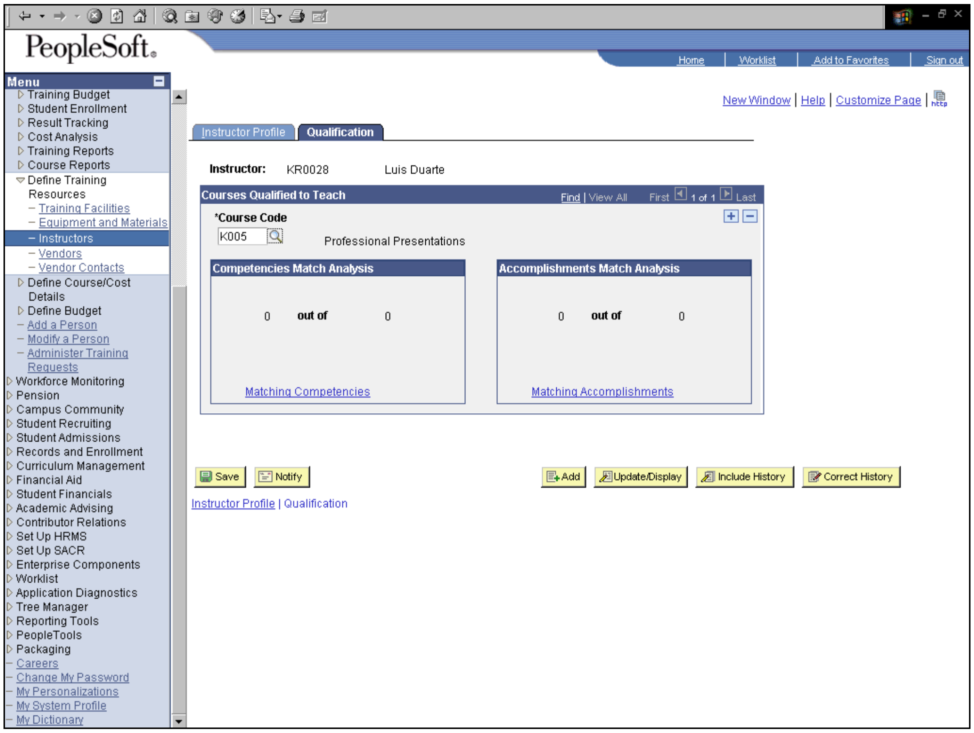
Step	Action
4.	Enter the desired information into the **Instructor ID** field. Example: "**KR0028**".
5.	Click the **Add** button. 



Step	Action
6.	Click the **Qualification** tab.
7.	Use the **Qualification** page to add, update, or display the courses that the instructor is qualified to teach.



Step	Action
8.	In the **Course Code** field, specify a course code from the list of courses that the instructor will teach. Enter the desired information into the ***Course Code** field. Example: "**K005**".
9.	To list an additional course the instructor is qualified to teach, you would click the plus (+) key. This would give you another row, where you can add an additional **Course Code.**



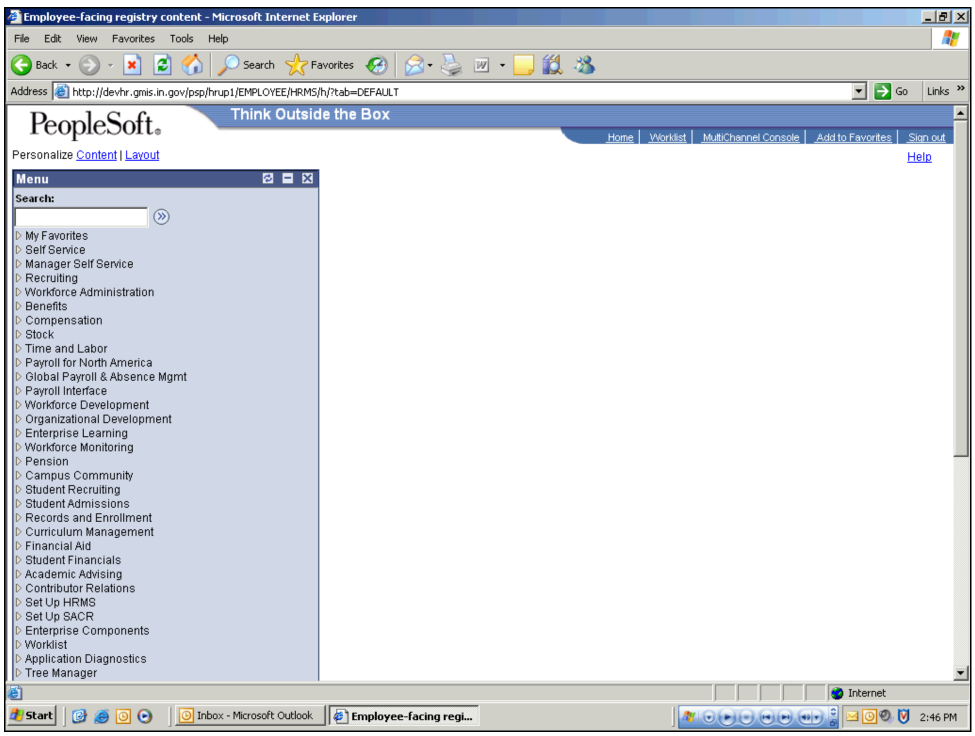
Step	Action
10.	Click the **Save** button. 
11.	You have successfully added Luis Duarte as an instructor. **End of Procedure.**

Add a Person

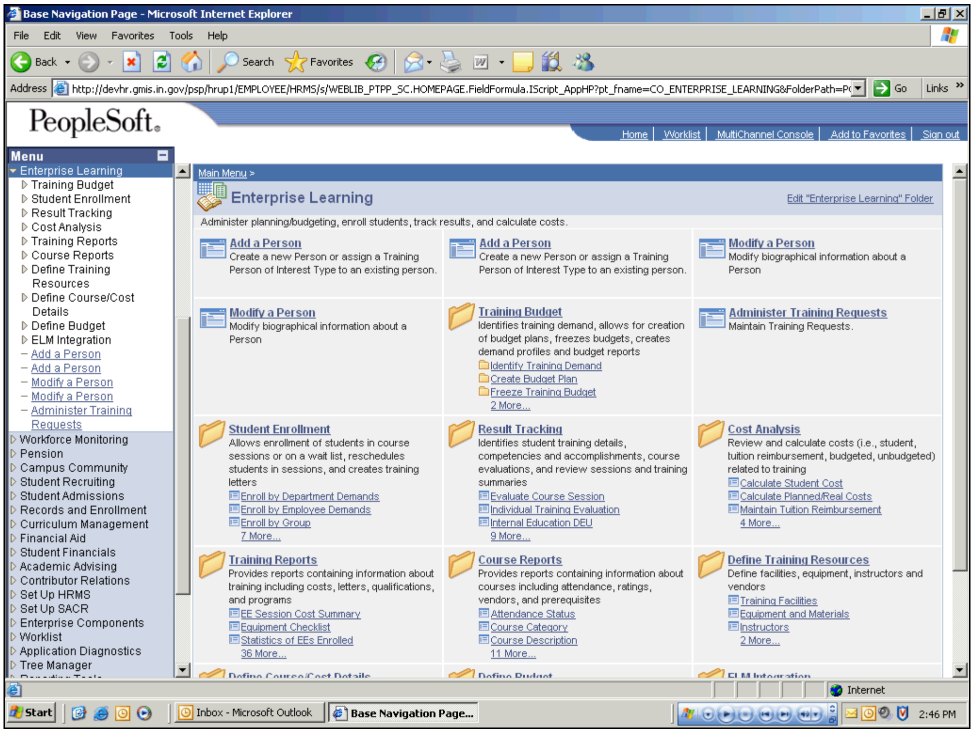
Add a Person (External Trainee)

Procedure

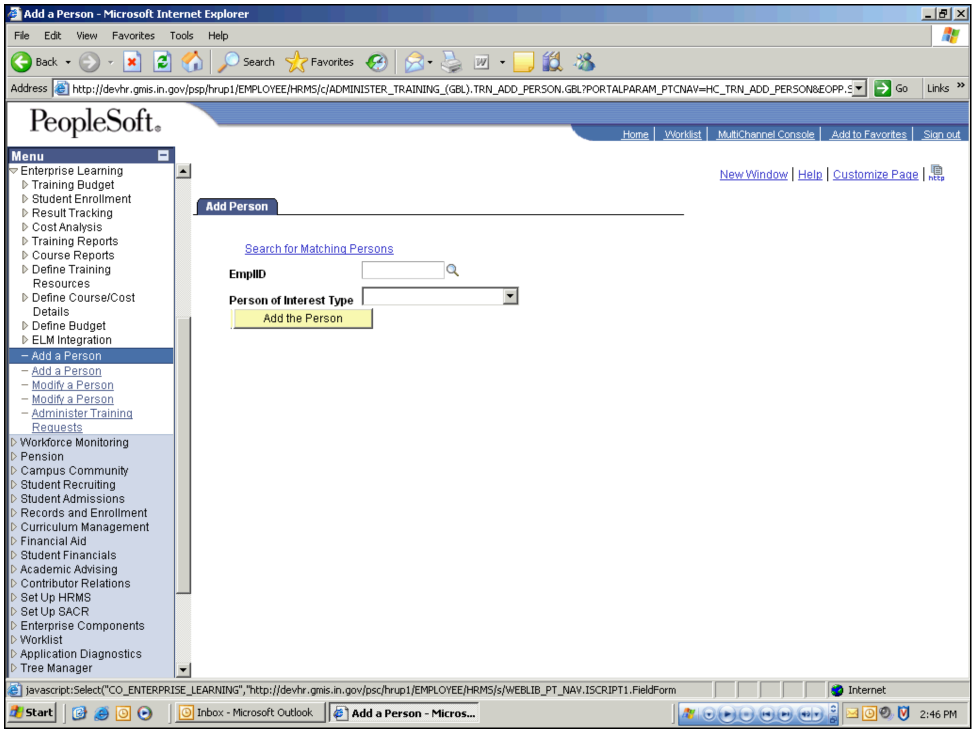
There are times when you may have trainees in your classes you want to track through PeopleSoft who are not regular state employees, e.g., contract employees. External employees are not input into the PeopleSoft system so you will need to add them as an external trainee before attempting to enroll them in a course.



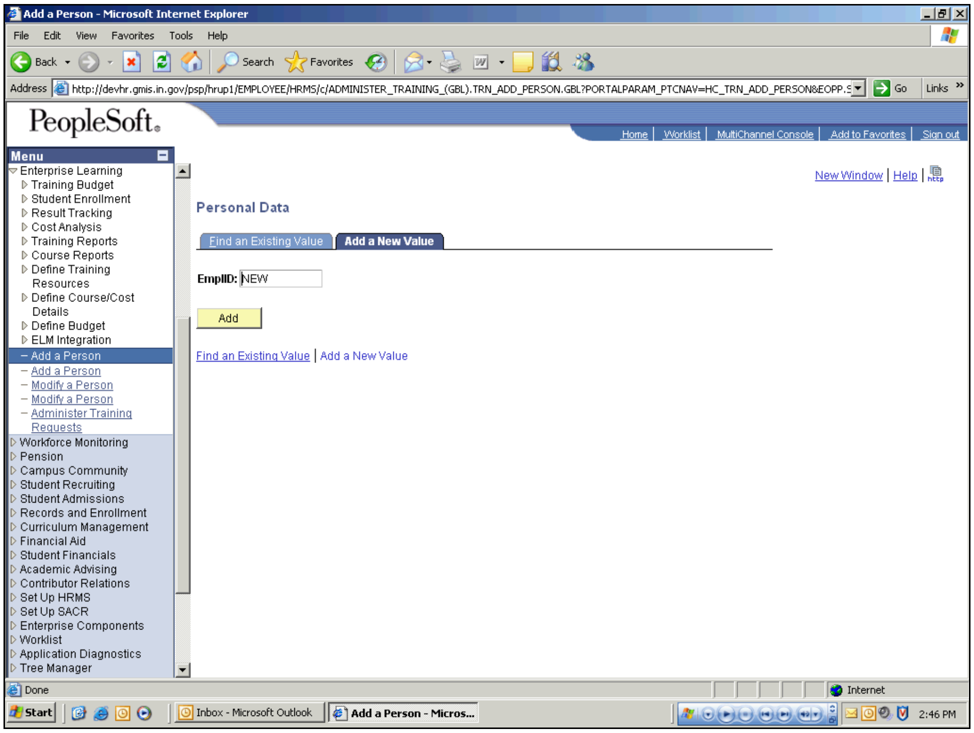
Step	Action
1.	Click the **Enterprise Learning** link. 



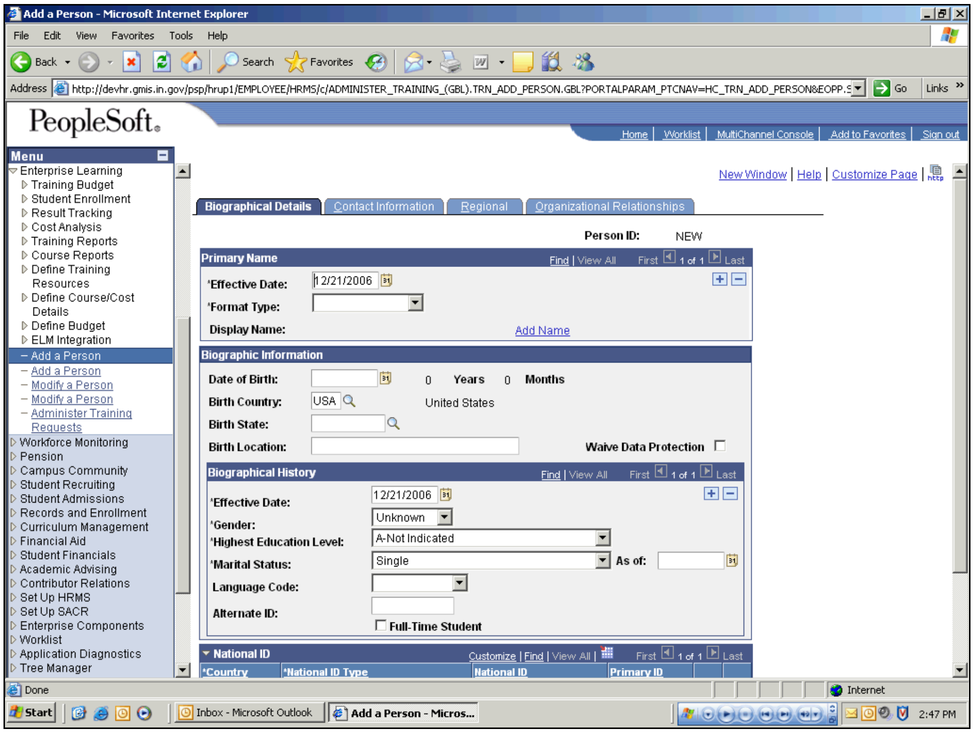
Step	Action
2.	Click the **Add a Person** button.



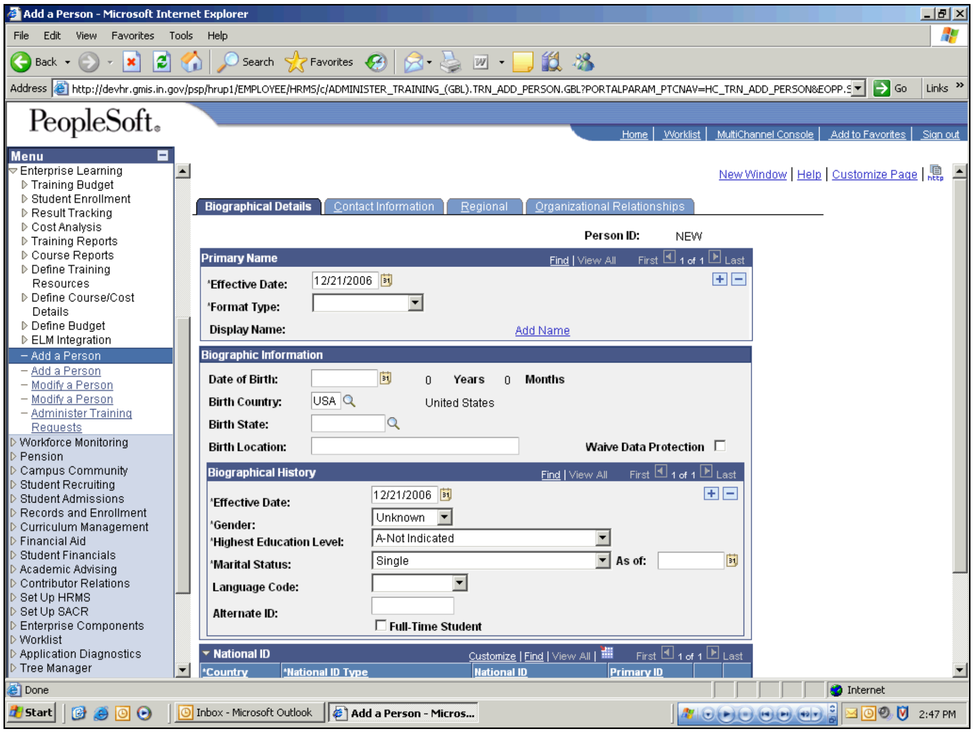
Step	Action
3.	Click the **Person of Interest Type** list.
4.	Select "External Trainee." External Trainee
5.	Click the **Add the Person** button. Add the Person



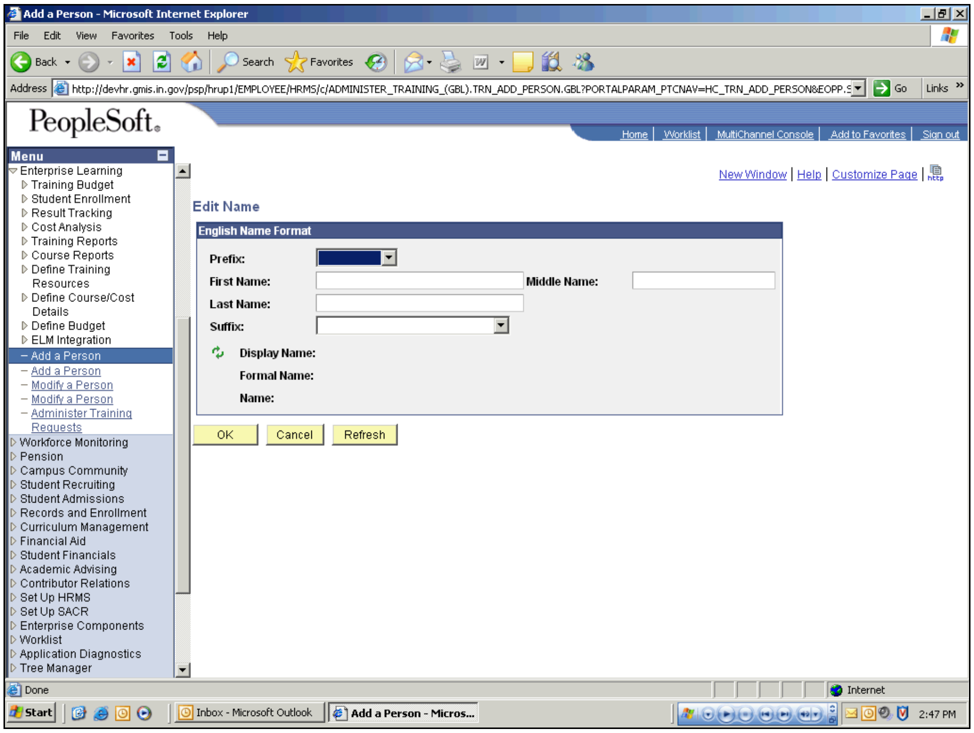
Step	Action
6.	Click the **Add** button. Add

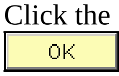


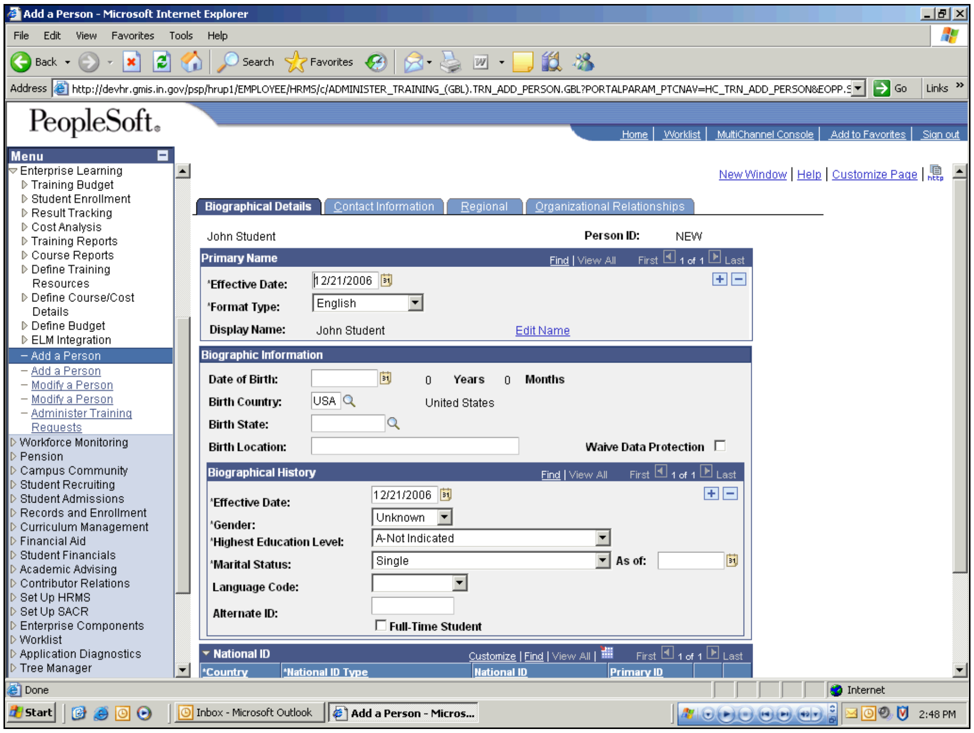
Step	Action
7.	For the effective date, enter the first day this person began their working relationship with your agency. 12/21/2006



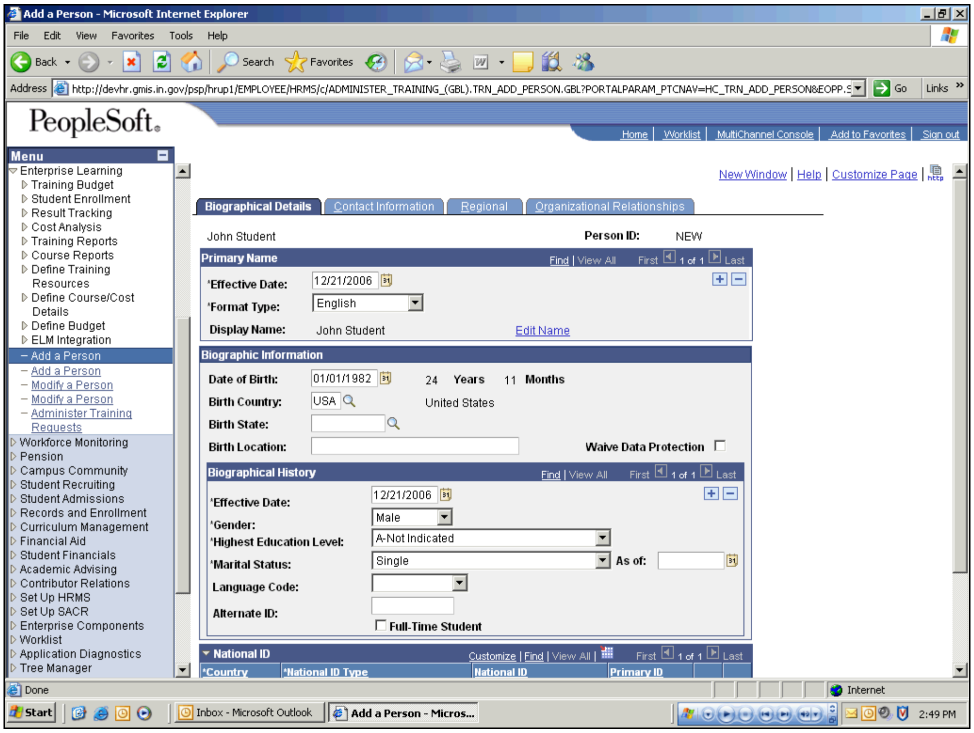
Step	Action
8.	Click the ***Format Type** list. 
9.	Select English in the drop down list. 
10.	Click the **Add Name** link. 



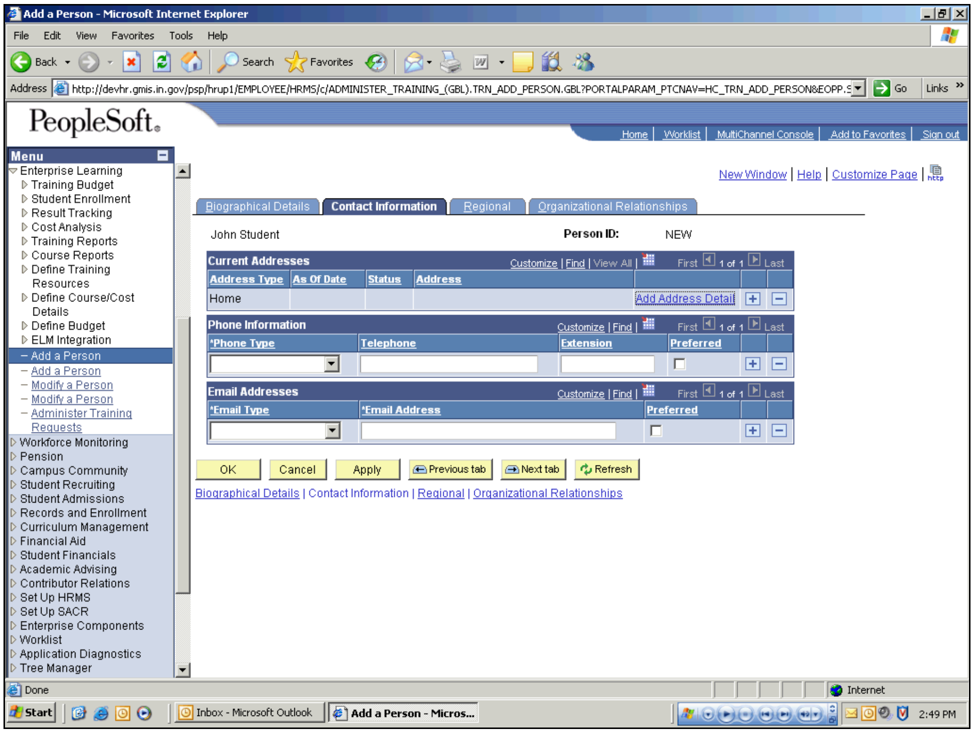
Step	Action
11.	Enter the desired information into the **First Name** field. Example: "**John**".
12.	Enter the desired information into the **Last Name** field. Example: "**Student**".
13.	Click the **OK** button. 



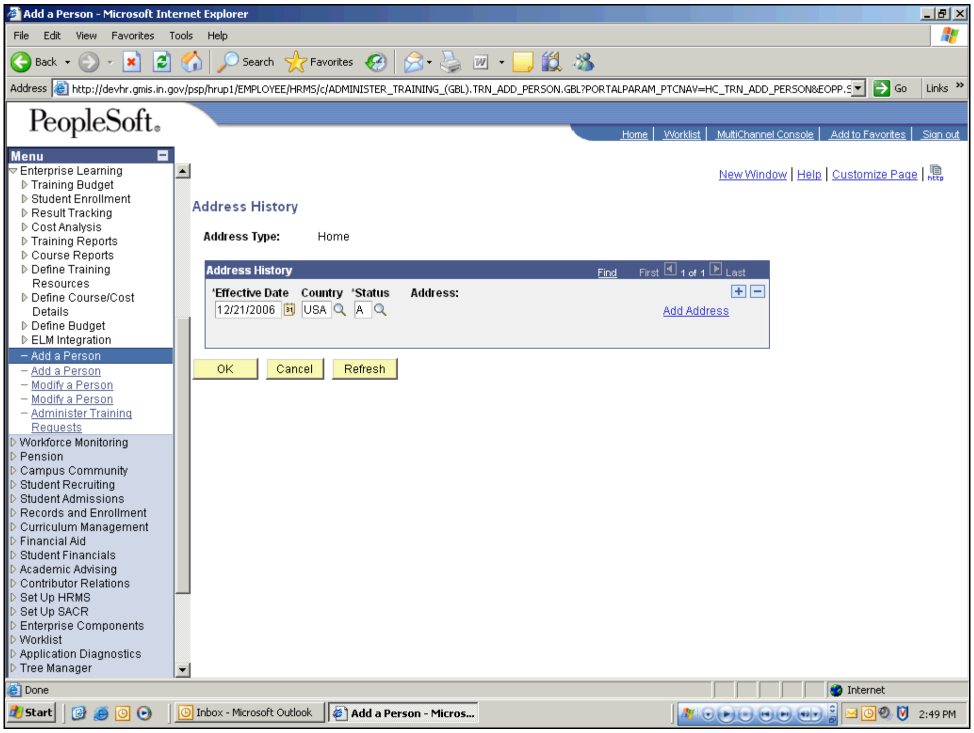
Step	Action
14.	Enter the desired information into the **Date of Birth** field. Example: "**010182**".
15.	Leave gender as "Unknown" for External Trainee. Unknown
16.	Click the ***Marital Status** list. Single
17.	Select "Unknown" for Marital Status for External Trainee.
18.	Click the ***National ID Type** list. Social Security Number
19.	Select "Driver's License Number" for External Trainee. Driver's License Number
20.	Enter the external trainee’s Driver’s License or State ID number into the **National ID** field. Example: "**2156-89-6532**".



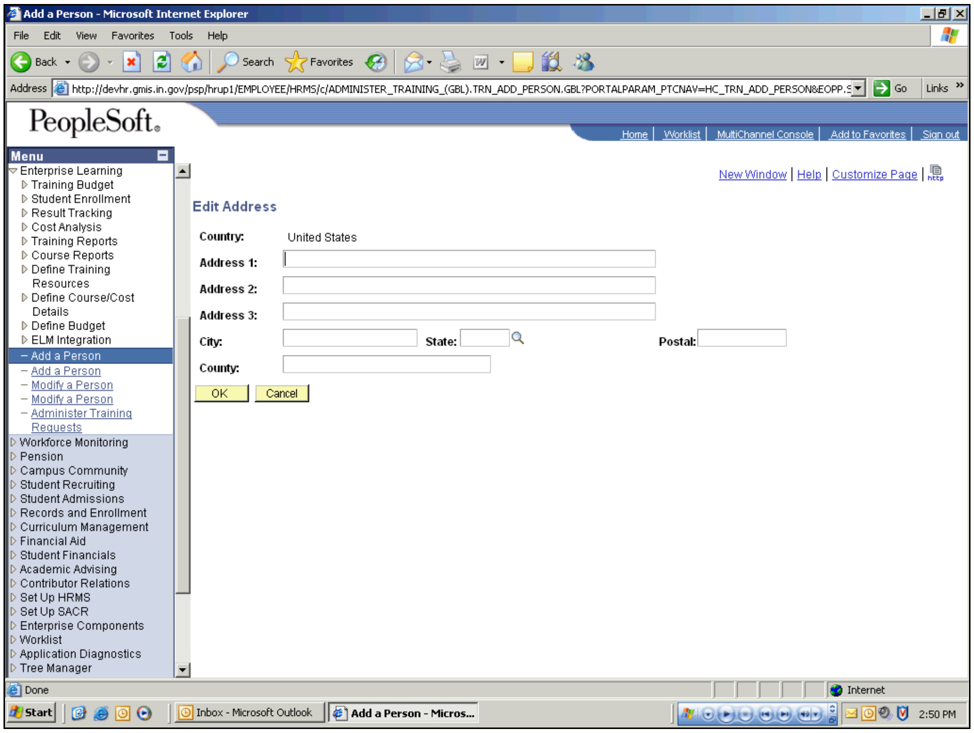
Step	Action
21.	Click the **Contact Information** tab. Contact Information

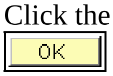


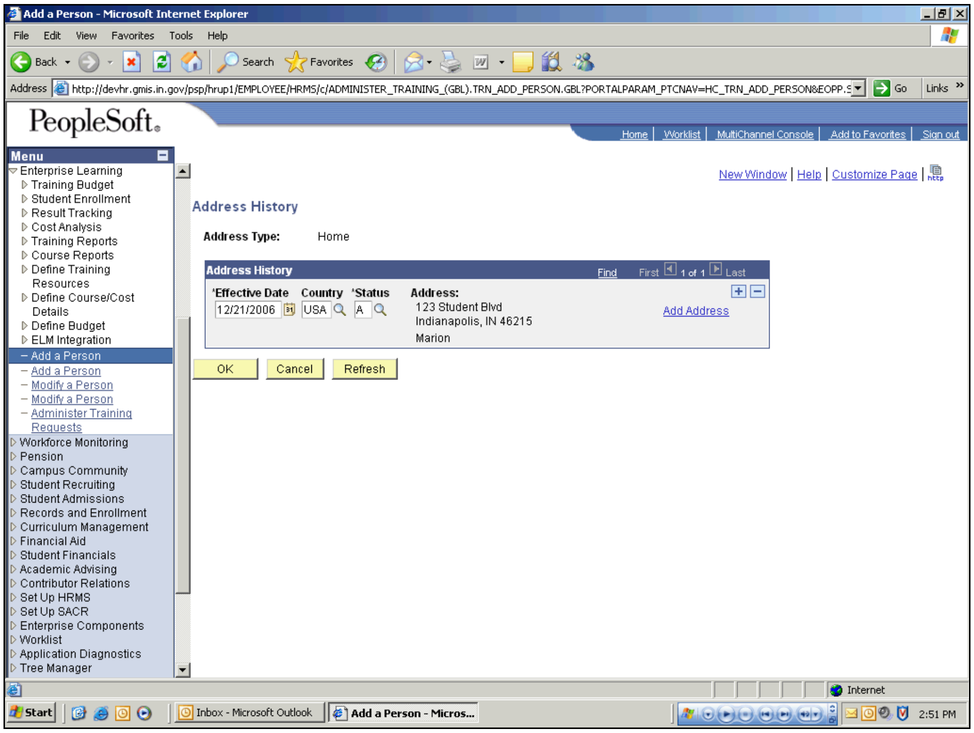
Step	Action
22.	Click the **Add Address Detail** link. Add Address Detail

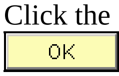


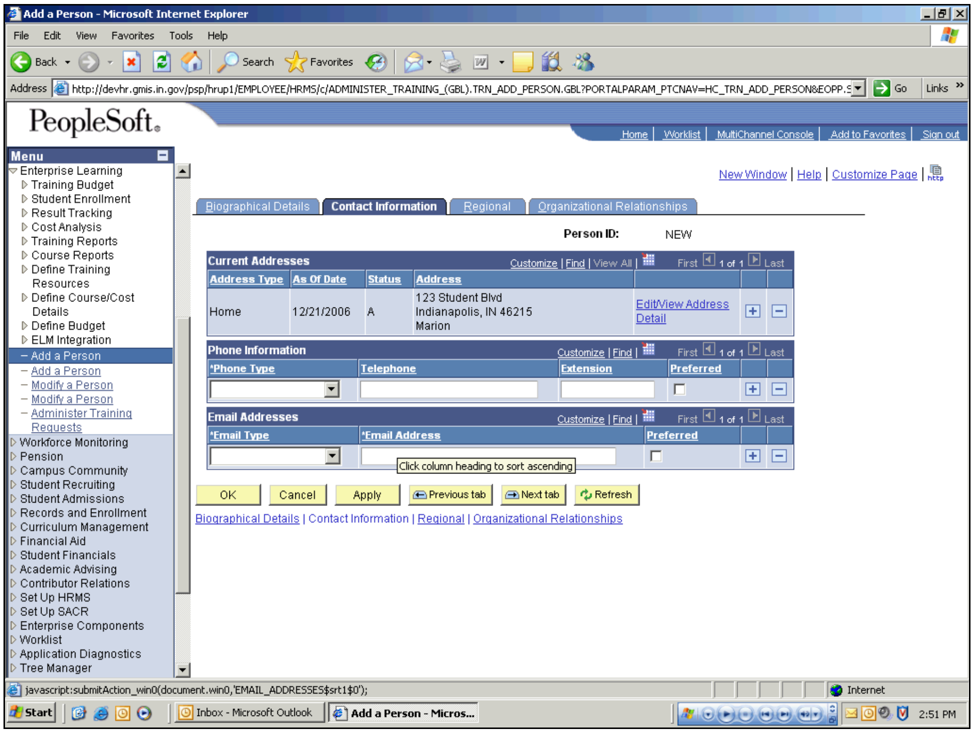
Step	Action
23.	Click the **Add Address** link. Add Address

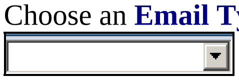


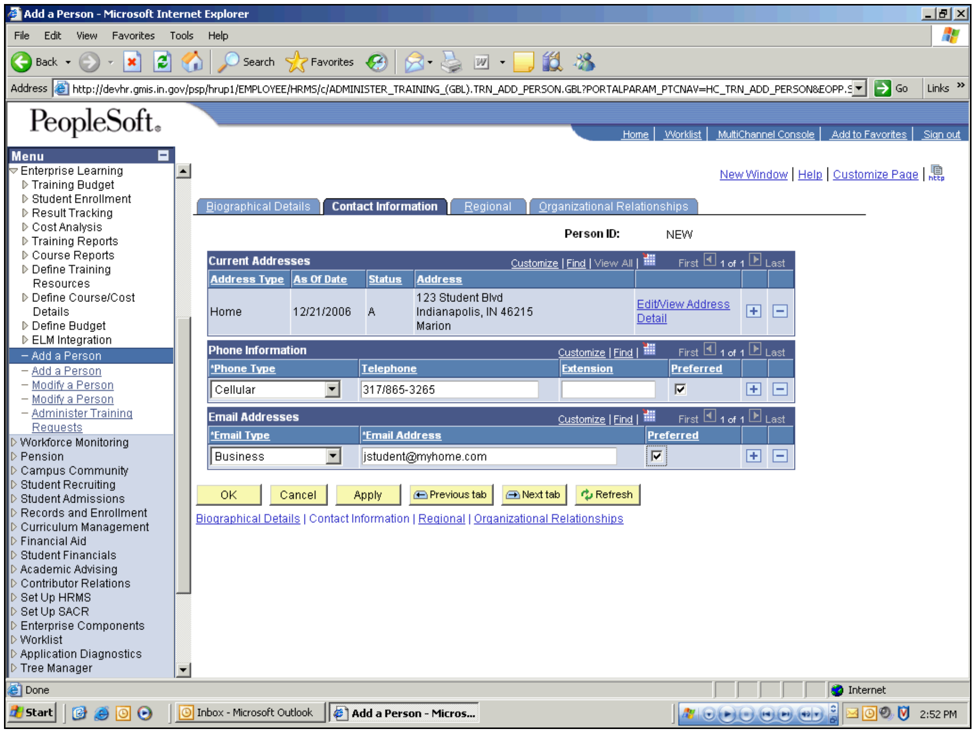
Step	Action
24.	Enter the desired information into the **Address 1** field. Example: "**123 Student Blvd**".
25.	Enter the desired information into the **City** field. Example: "**Indianapolis**".
26.	Enter the desired information into the **State** field. Example: "**IN**".
27.	Press the Tab key.
28.	Enter the desired information into the **Postal** field. Example: "**46215**".
29.	Enter the desired information into the **County** field. Example: "**Marion**".
30.	Click the **OK** button. 



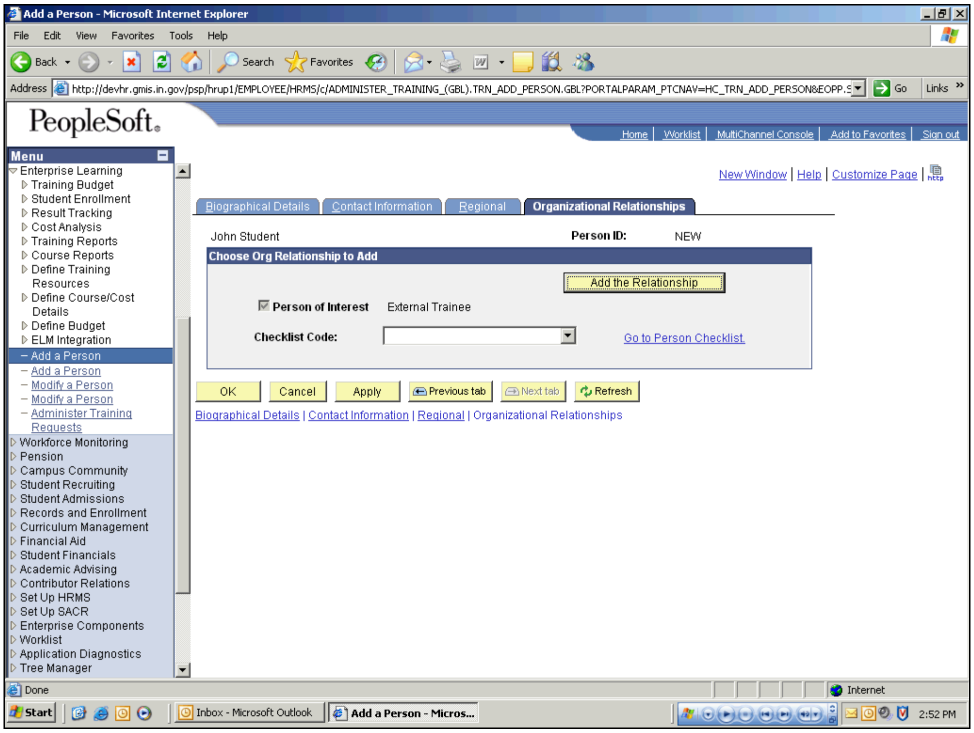
Step	Action
31.	Click the **OK** button. 

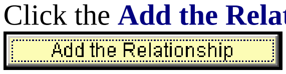


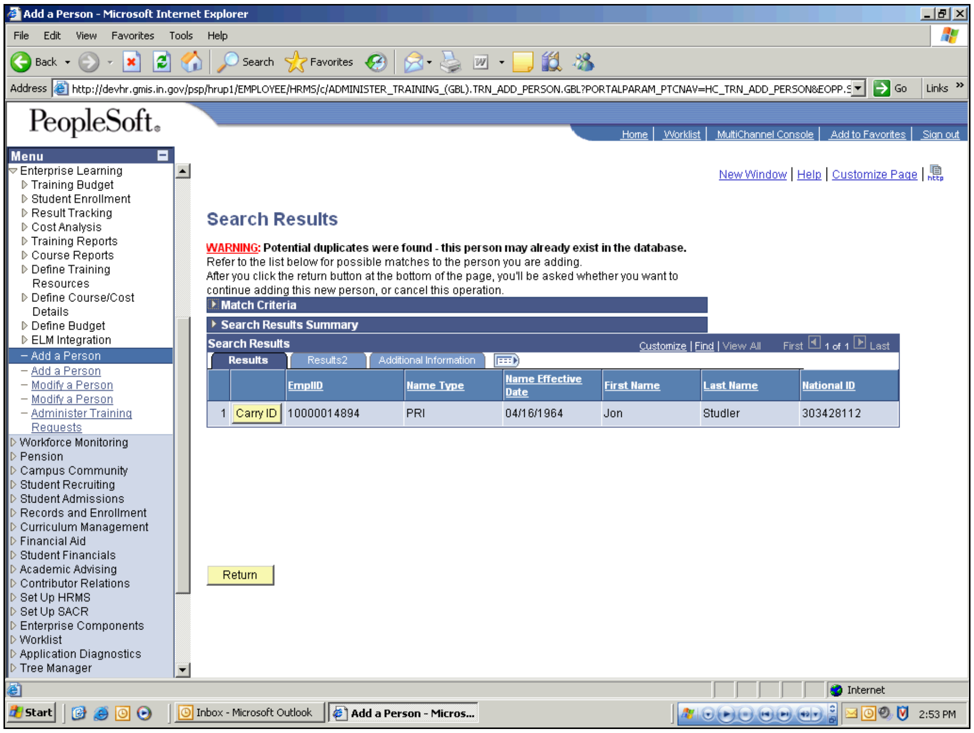
Step	Action
32.	Choose a **Phone Type** in the drop down list. 
33.	Enter the desired information into the **Telephone** field. Example: "**3178653265**".
34.	Press the Tab key.
35.	Click the **Preferred** option. 
36.	Choose an **Email Type** from the drop down list. 
37.	Enter the desired information into the ***Email Address** field. Example: "**jstudent@myhome.com**".
38.	Click the **Preferred** option. 



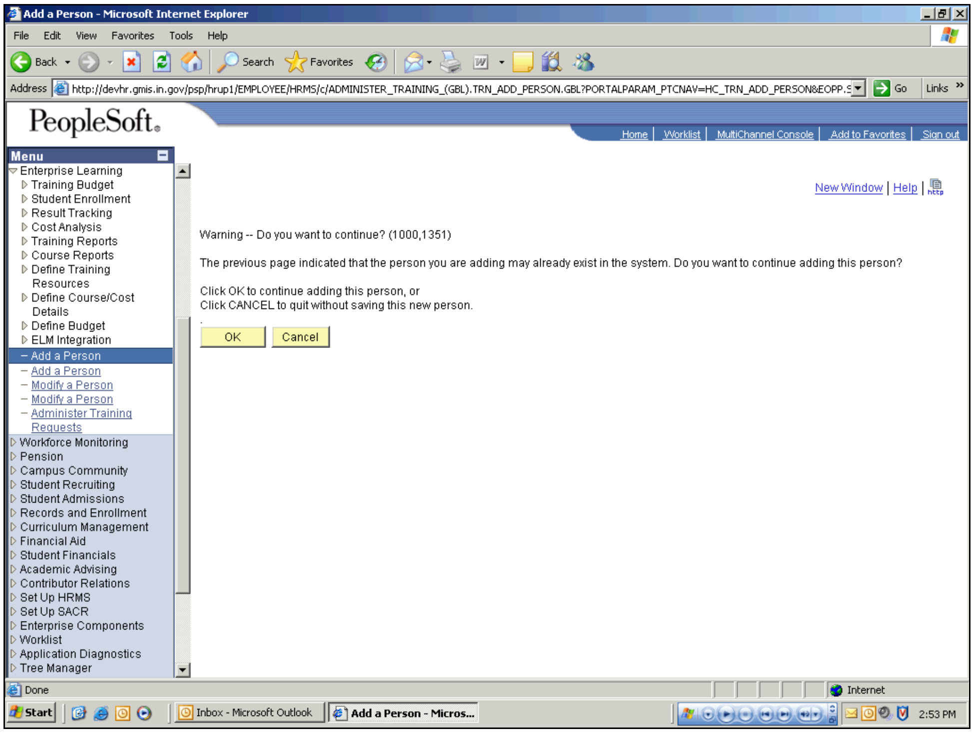
Step	Action
39.	Click the **Organizational Relationships** tab. Organizational Relationships

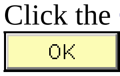


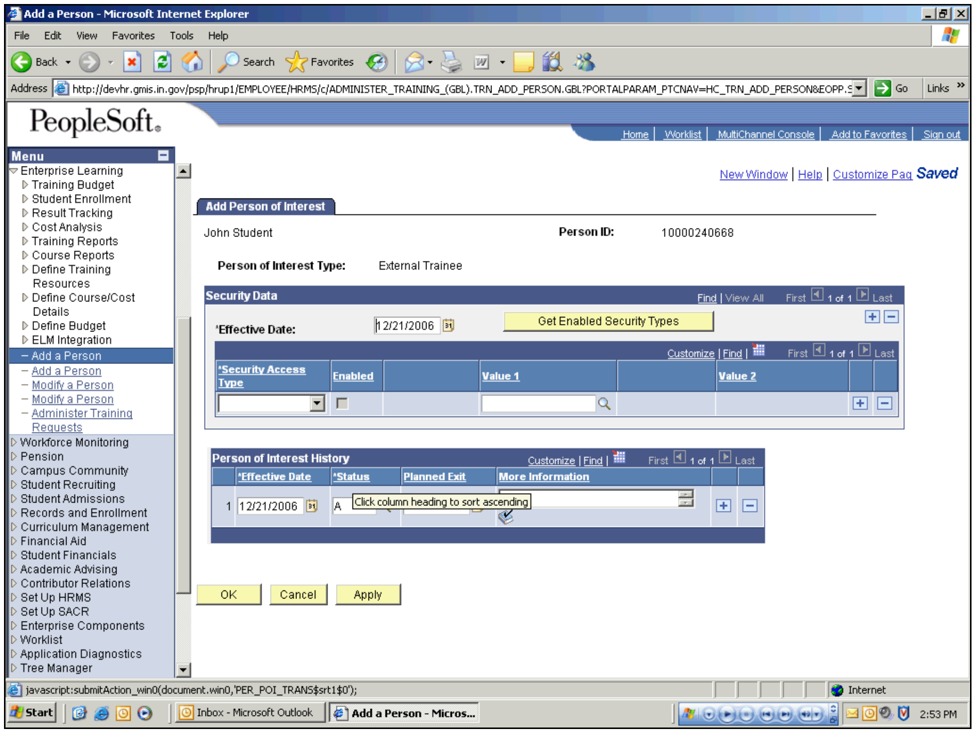
Step	Action
40.	Click the **Add the Relationship** button. 



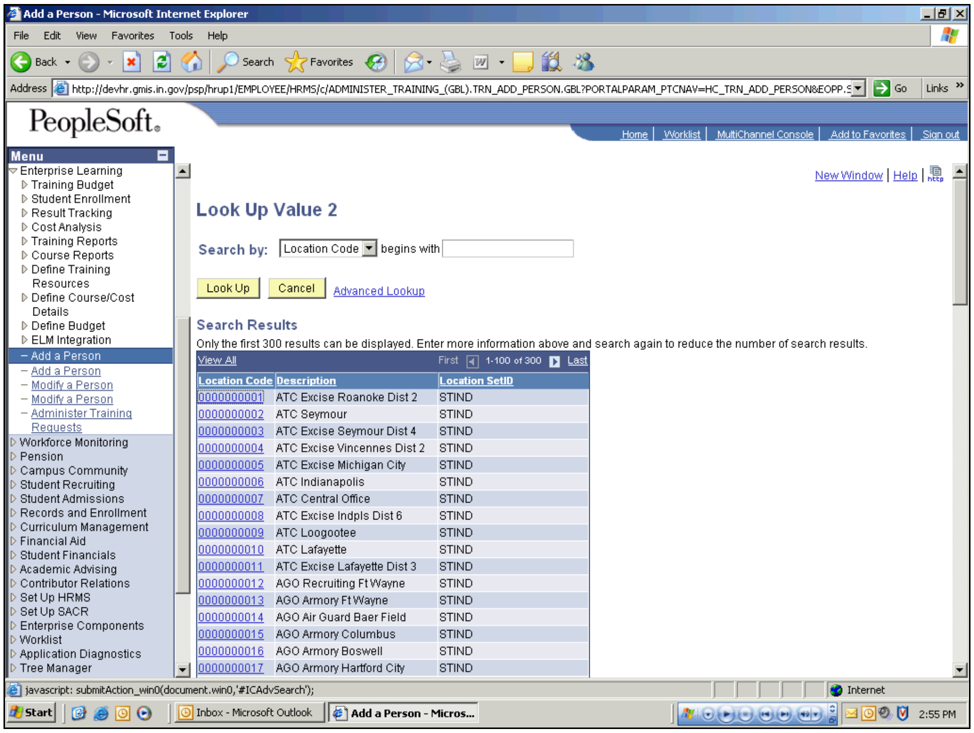
Step	Action
41.	Click the **Return** button. This screen will display all values matched by first name, last name, and National ID number. This search is utilized to determine if the person being added already has a record in the PeopleSoft system. If there is a match for the person being added, click "Carry ID" to utilize the PeopleSoft ID number already assigned to this person. If no match exists, click on Return. If no match exists when you click on Return a PeopleSoft Empl ID# will be assigned automatically by the system. Return



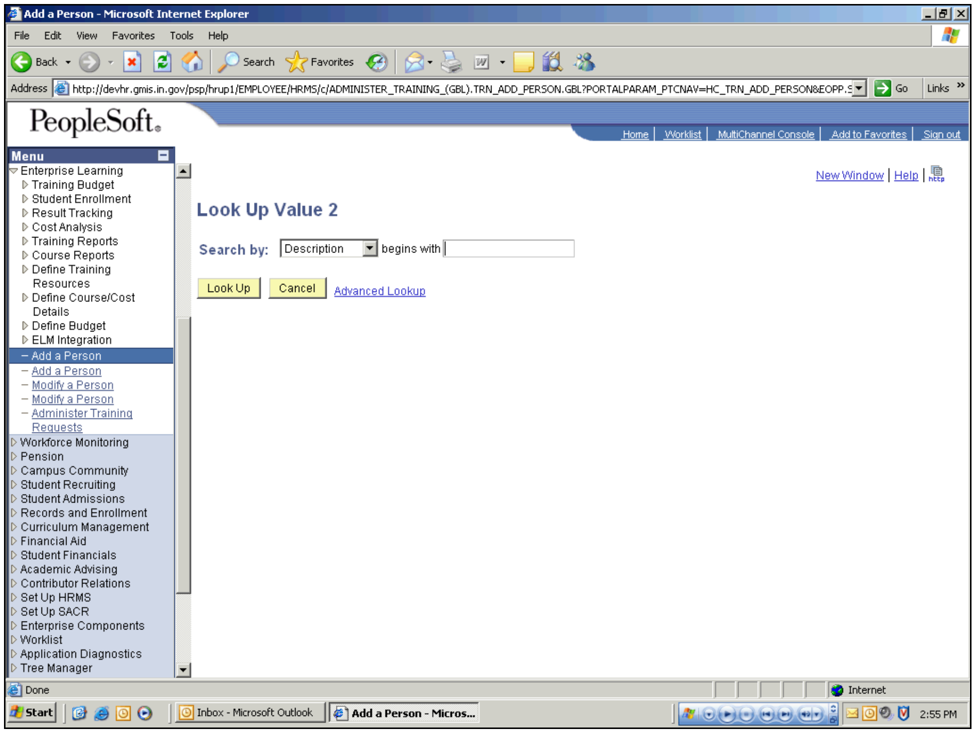
Step	Action
42.	Click the **OK** button. 



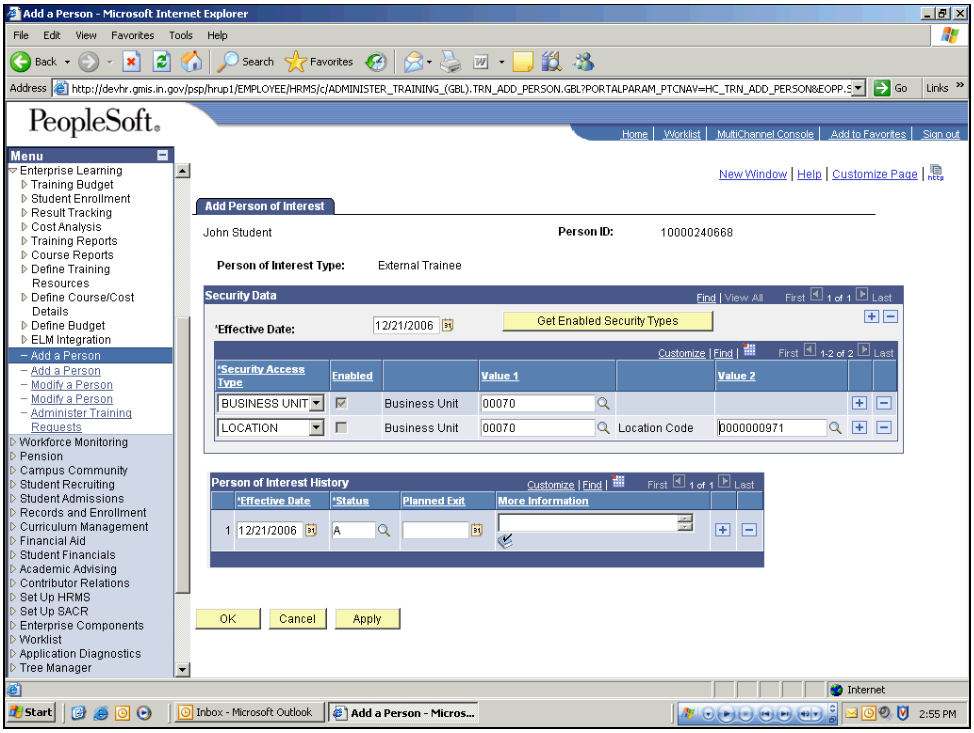
Step	Action
43.	Under Security Access Type, choose **Business Unit**.
44.	Enter the Business Unit into the **Value 1** field. Example: "**00070**".
45.	Press the Tab key.
46.	Click the **Add a new row at row 1 (Alt+7)** button.
47.	In the newly added row under Security Access Type, choose **Location**.
48.	Press the Tab key.
49.	Click the **Look up Value 2 (Alt+5)** button.



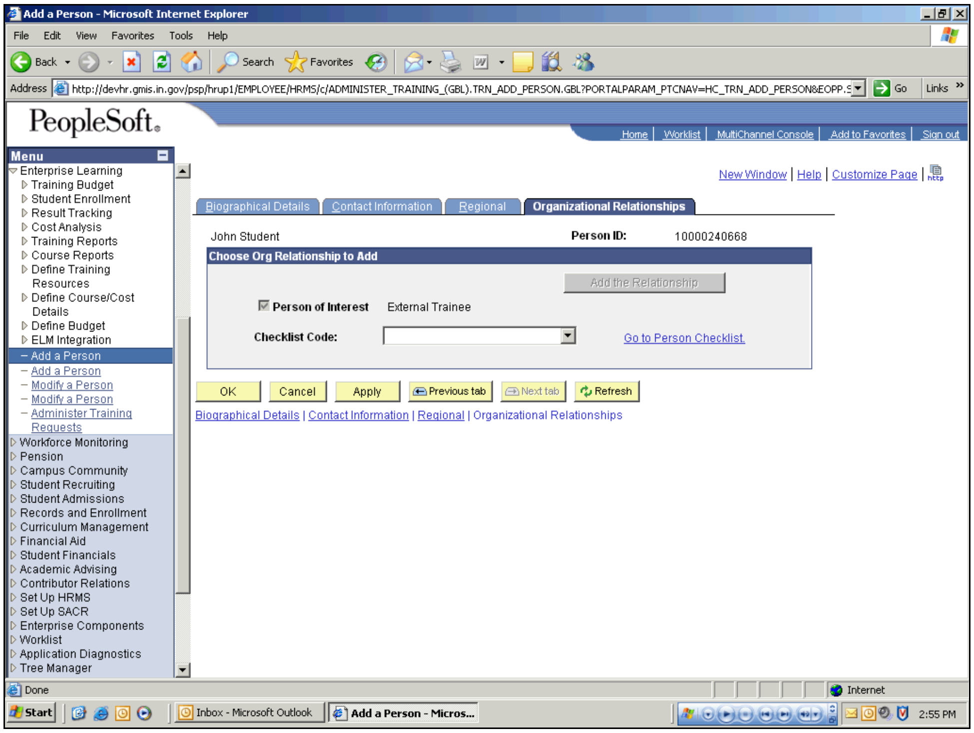
Step	Action
50.	Choose **Description** from the drop down list. 



Step	Action
51.	Enter the desired information into the **begins with** field. Example: "**state**".
52.	Click the **Look Up** button. Look Up
53.	Choose **State Personnel Department** from the Search Results list. State Personnel Department



Step	Action
54.	Click the **OK** button. OK



Step	Action
55.	Click the **OK** button. OK
56.	**End of Procedure.**

Enrolling Students

Enrolling Students Individually

Once you have set up your course sessions, you are ready to start enrolling students and adding students to course and session waiting lists. There are several methods of enrolling students, so you can select the best option for your facility. For example, you may set up sessions in advance and publish a training schedule that students review and submit enrollment requests. Alternatively, you may prefer to set up waiting lists and create course sessions when there are enough students on the lists to fill the session.

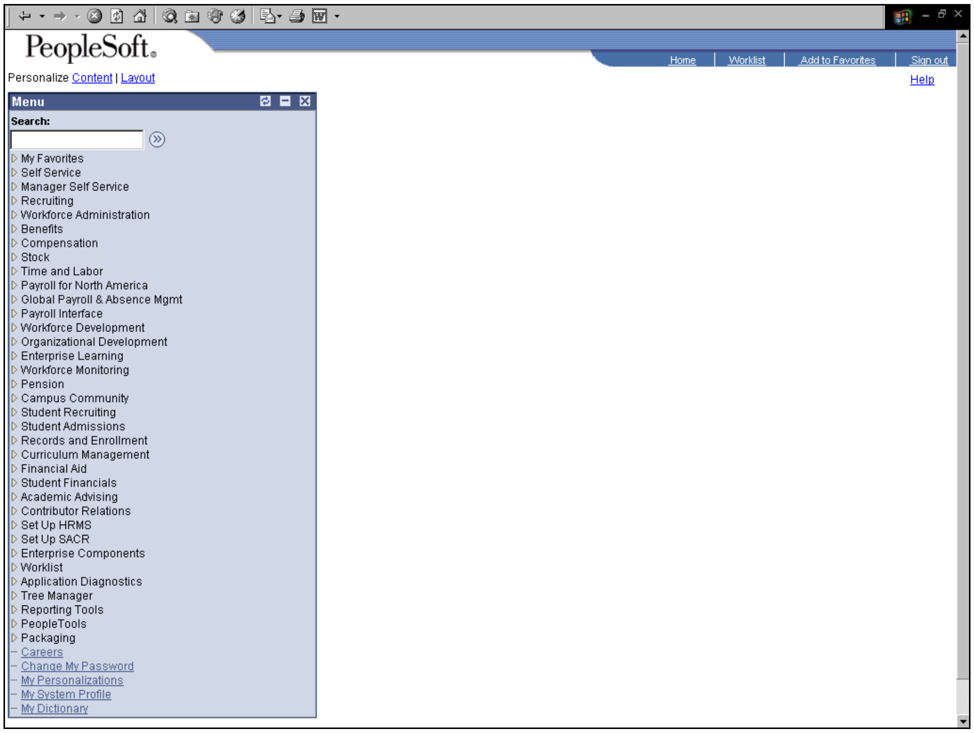
You use the **Course Session Enrollment** page to enroll students individually in a session. Before enrolling students, you set up the session by using the Course Session table.

You can use the **Course Session Enrollment** page to enroll multiple students in the same session. You may enroll students or adjust the existing enrollment status codes for students already enrolled. For instance, if a student requests to withdraw their enrollment in the class, you would change the status from enrolled to dropped.

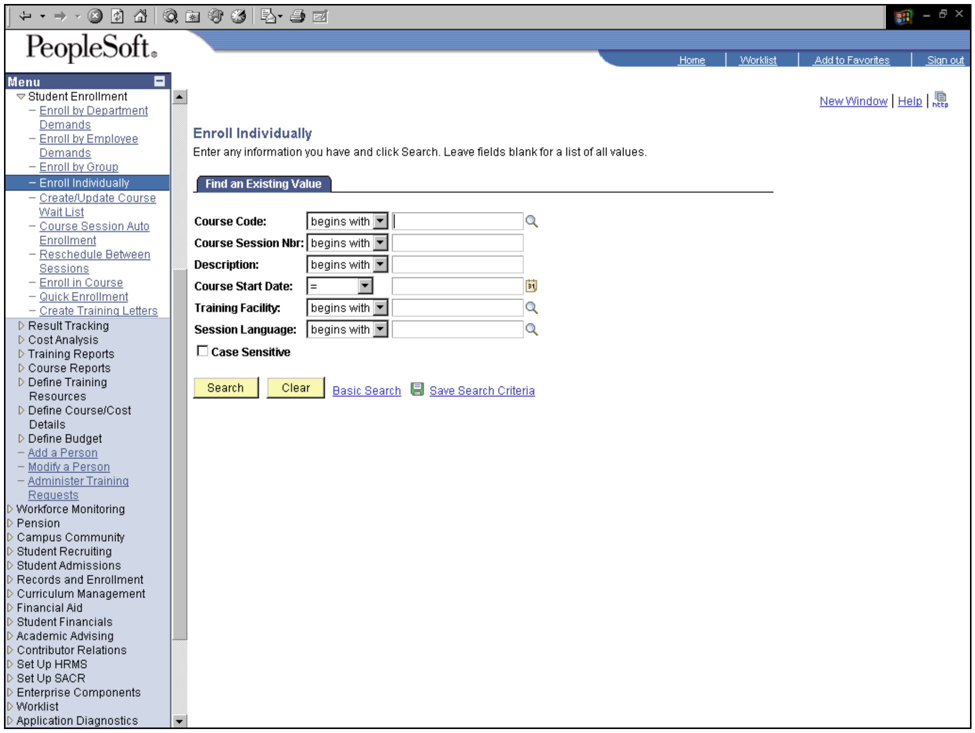
NOTE: You may only view and change enrollments for course sessions that <u>have not</u> been marked Complete.

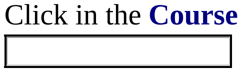
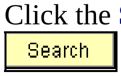
In this example, two employees want to enroll in the Presentation Skills course session 0001. Your goal is to enroll these students individually in this session and verify their enrollments.

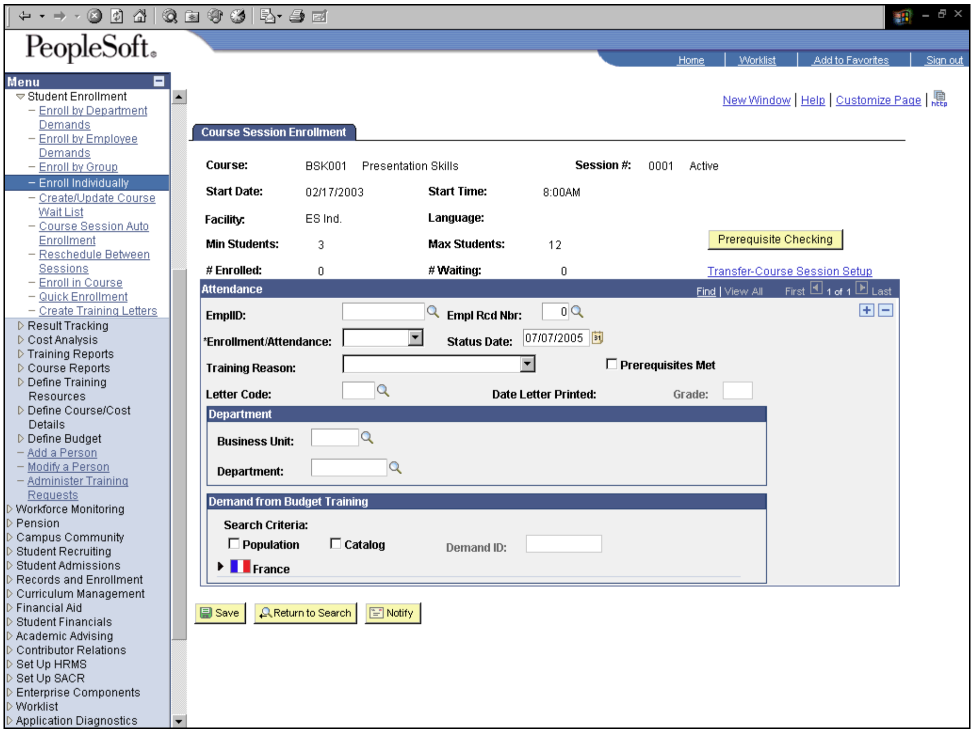
Procedure



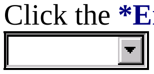
Step	Action
1.	Begin by navigating to the **Course Session Enrollment** page. Click the **Enterprise Learning** link. 
2.	Click the **Student Enrollment** link.
3.	Click the **Enroll Individually** link.



Step	Action
4.	Enter the desired information into the **Course Code** field. Example: "**BSK001**".
5.	Click in the **Course Session Nbr** field. 
6.	Enter the desired information into the **Course Session Nbr** field. Example: "**0001**".
7.	Click the **Search** button. 
8.	Use the **Course Session Enrollment** page to enroll students. **CAUTION:** As you select each student for enrollment, always double-check the Business Unit field and verify that it is the correct employee. Name searches sometimes display more than one individual with the same name.



Step	Action
9.	Enter the desired information into the **EmplID** field. Example: "**KR0040**".
10.	Specify the student enrollment status, such as Enrolled or Sessn Wait in the **Enrollment/Attendance** field. Click the ***Enrollment/Attendance** list.
11.	Select **Enrolled**. Enrolled
12.	The **Status Date** field uses the current system date by default. Accept the default date for this field.
13.	Specify the reason for training in the **Training Reason** field. Click the **Training Reason** list.
14.	Click an entry in the list. Always select **Skill Enhancement.** Skill Enhancement

Step	Action
15.	Leave the **Prerequisites Met** option turned off. After you have finished all enrollments, you may use **Prerequisite Checking** (above) to verify that your students' course requirements have been met. Prerequisites, if used, would need to be set up when the Course is entered into the system.
16.	You may use the **Prerequisite Checking** button to search the Student Training records listed on the **Session Enrollment** page and determine if each student has completed and passed the prerequisite courses. If so, PeopleSoft populates the **Prerequisites Met** check box for each student who meets the criteria. If a student is lacking the necessary courses, a process for notifying students of discrepancies may be developed. Also, any enrolled status existing for students who do not meet the prerequisites may be manually changed.
17.	Use the **Letter Code** field to generate a form letter. The letter code defaults to CON, indicating Confirmed. For this exercise, accept the default letter code value. **IMPORTANT!!** The system does not currently support the generation of letters. At this time, you must have an alternative method of notifying students.
18.	We will now add another student. Click the **Add Row** button. 
19.	Enter the desired information into the **EmplID** field. Example: "**KR0041**".
20.	Click the ***Enrollment/Attendance** list. 
21.	Click an entry in the list. Select **Enrolled.** 
22.	Click the **Training Reason** list. 
23.	Click an entry in the list. Select **Skill Enhancement.** 
24.	You have enrolled two employees in Presentation Skills course session 0001. If you enroll more than the maximum number of employees allowed in the session, the PeopleSoft application issues a warning message when you save the page.
25.	Your enrollment(s) are completed. Click the **Save** button. 

Step	Action
26.	You have successfully enrolled individual students into a course session. **End of Procedure.**

Creating a Wait List

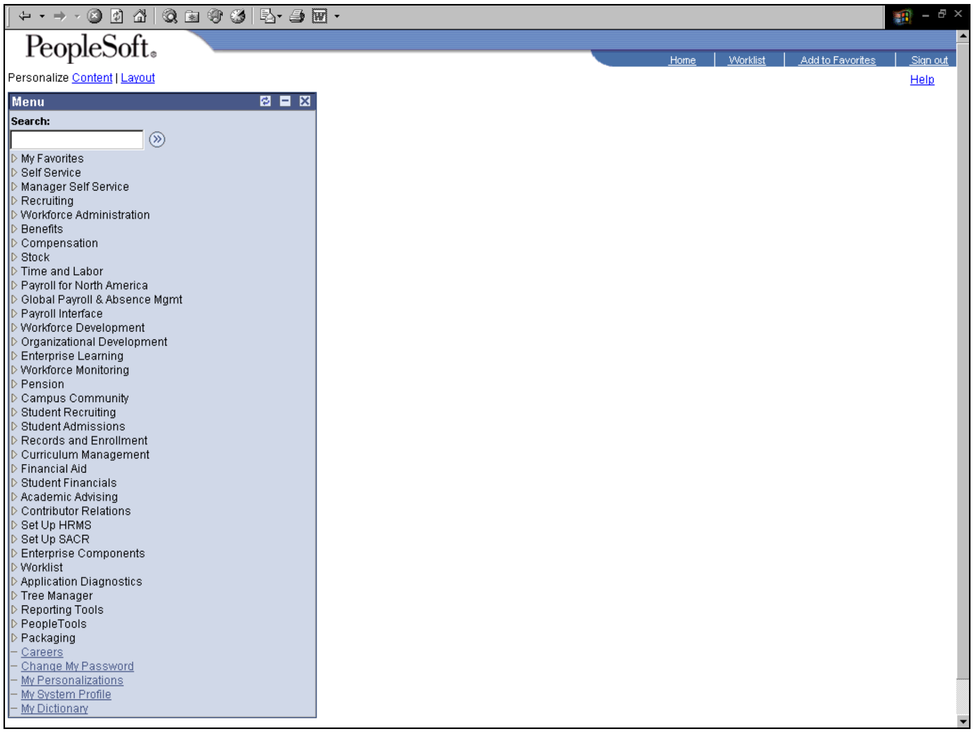
Wait lists are used to organize the enrollment process and ensure fair enrollment. In addition, you use wait lists to monitor course demand and create sessions when enrollment demand is high. Alternatively, they are used to collect requests for existing course sessions, and enable automatic enrollment of students in the session.

With the use of wait lists and automatic session enrollment, it is necessary to understand the way PeopleSoft processes information. The order in which students are enrolled from wait lists into sessions is determined by the PeopleSoft processing logic.

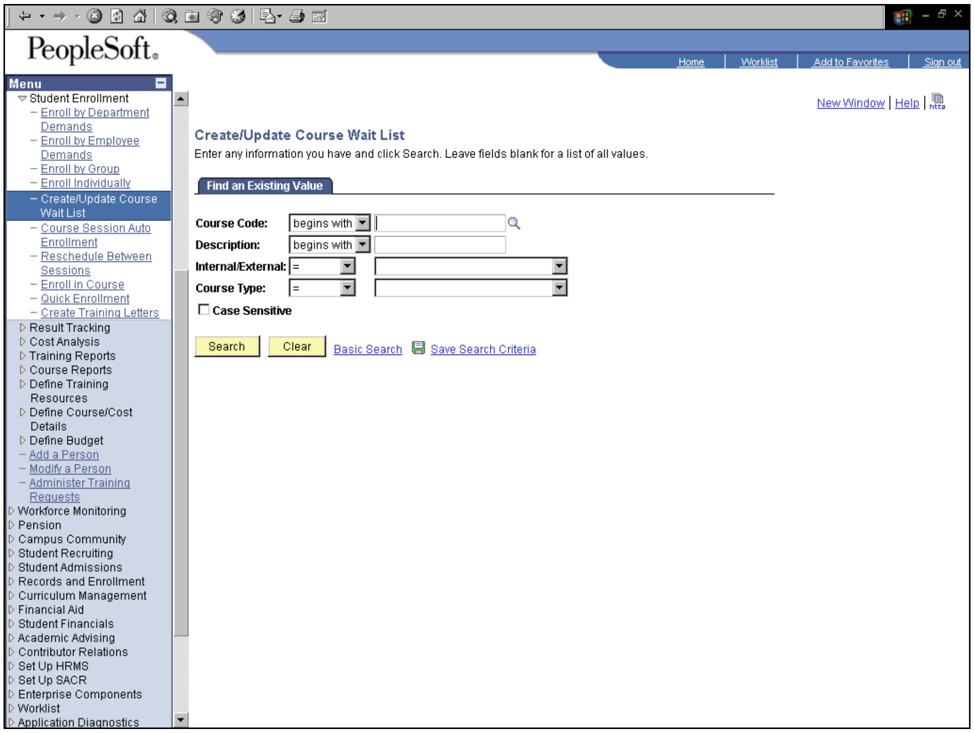
When using course auto-enrollment, the session for which students are being enrolled must be specified. Once the session is selected, PeopleSoft enrolls students in the following order of preference or hierarchy:
• **Session Waitlist Status:** Students with session wait list for the particular session selected are given priority over any student with a general course wait list status.
• **Waitlist Date:** Students with session wait list status are then sorted for enrollment based on their wait list date, the date they were entered onto the wait list. Generally, the student with the oldest date is given first priority. If multiple students share the same date, priority is based on ID.
• **ID:** Among students who share the same session wait list date, employees always get first opportunity for training sessions. If all of those employees have been enrolled, then non-employees with that same session wait list date are enrolled.
• If all students with session wait list status for this session have been enrolled, then students with general course wait list status are enrolled under the same wait list date and ID guidelines listed above for session wait list status.
• If a session has fewer seats available than students of equal standing, PeopleSoft does not perform any enrollment automatically. In that case, manual enrollment must be used, and some other form of selection must be imposed. Alternatively, the session could be modified to allow a larger enrollment.

In this exercise, two people requested enrollment in the Professional Presentations course session K005. Your goal is to add them to a wait list for the Professional Presentations course session.

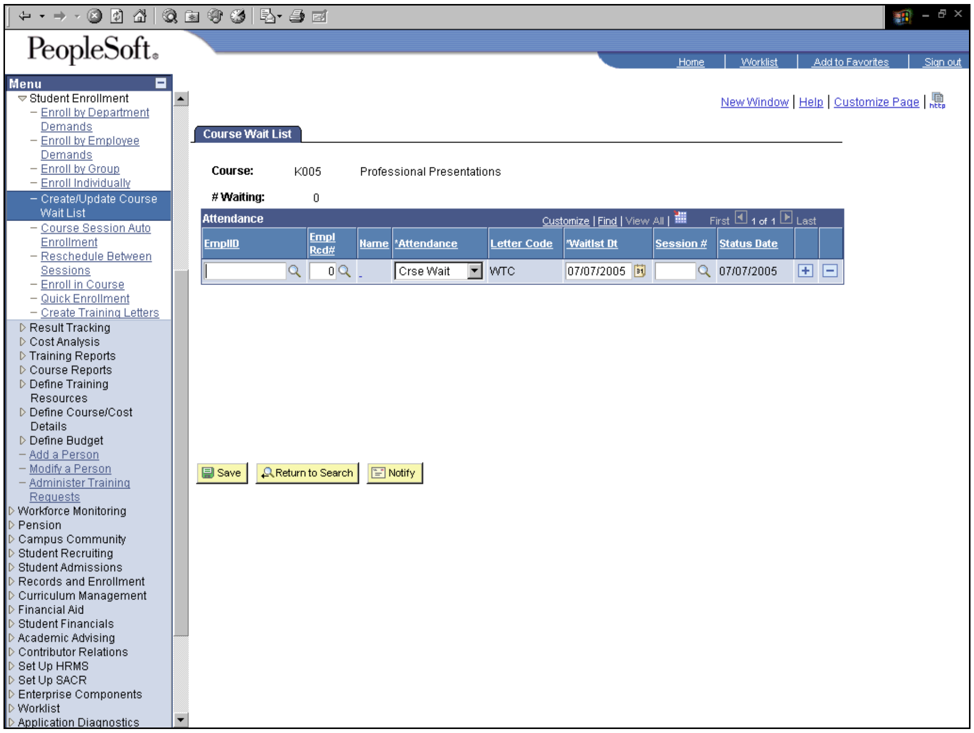
Procedure

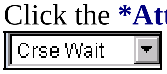


Step	Action
1.	Begin by navigating to the **Course Wait List** page. Click the **Enterprise Learning** link. 
2.	Click the **Student Enrollment** link.
3.	Click the **Create/Update Course Wait List** link.



Step	Action
4.	Enter the desired information into the **Course Code** field. Example: "**K005**".
5.	Click the **Search** button. Search
6.	Use the **Course Wait List** page to add employees and non-employees to wait lists and assign the enrollment status. For this exercise, add two employees to the wait list. To add them to the wait list, specify their IDs in the **EmplID** field.



Step	Action
7.	Enter the desired information into the **EmplID** field. Example: "**KU0097**".
8.	Assign a wait list status to the employee in the **Attendance** field. The PeopleSoft application provides a course wait list and a session wait list. Use both of these statuses in the processing logic when enrolling students from a wait list to a session. Click the ***Attendance** list. 
9.	Click an entry in the list. 
10.	The system populates a letter code from the **Standard Letter** table according to the student's wait list status. The system also populates the wait list date based on the current date. The PeopleSoft application uses this date to enroll students from the oldest date to the most recent date. You can override this date if the student requested for enrollment in the course on a different date. For this example, accept the default wait list date in the **Waitlst Dt** field.
11.	Click in the **Session #** field. 
12.	If you assign a session wait list status to a student, specify the session number from the list of Active sessions in the **Session #** field. Enter the desired information into the **Session #** field. Example: "**0072**".

Step	Action
13.	Click the **Add Row** button. 
14.	Enter the desired information into the **EmplID** field. Example: "**KU0098**".
15.	Click the ***Attendance** list. 
16.	Click an entry in the list. 
17.	Click in the **Session #** field. 
18.	Enter the desired information into the **Session #** field. Example: "**0072**".
19.	Click the **Save** button. 
20.	You have successfully created a wait list. **End of Procedure.**

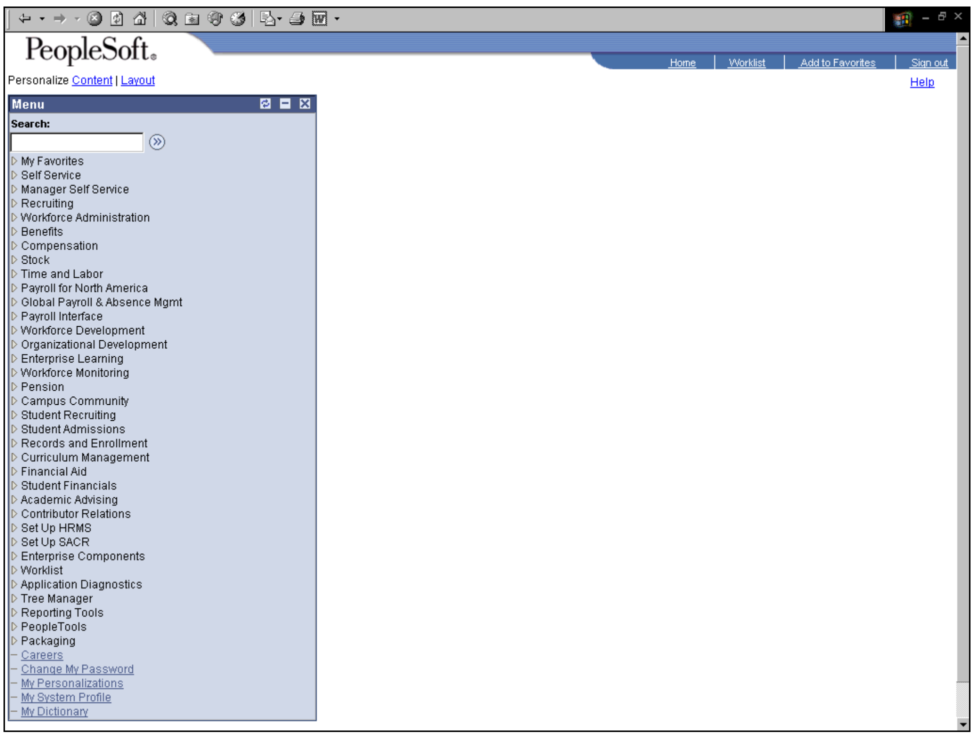
Creating a Course Session Roster

Once you have enrolled the students in a **Course Session,** you may print out the **Course Session Roster** for that session, which can be used for a **Sign-In Sheet**.

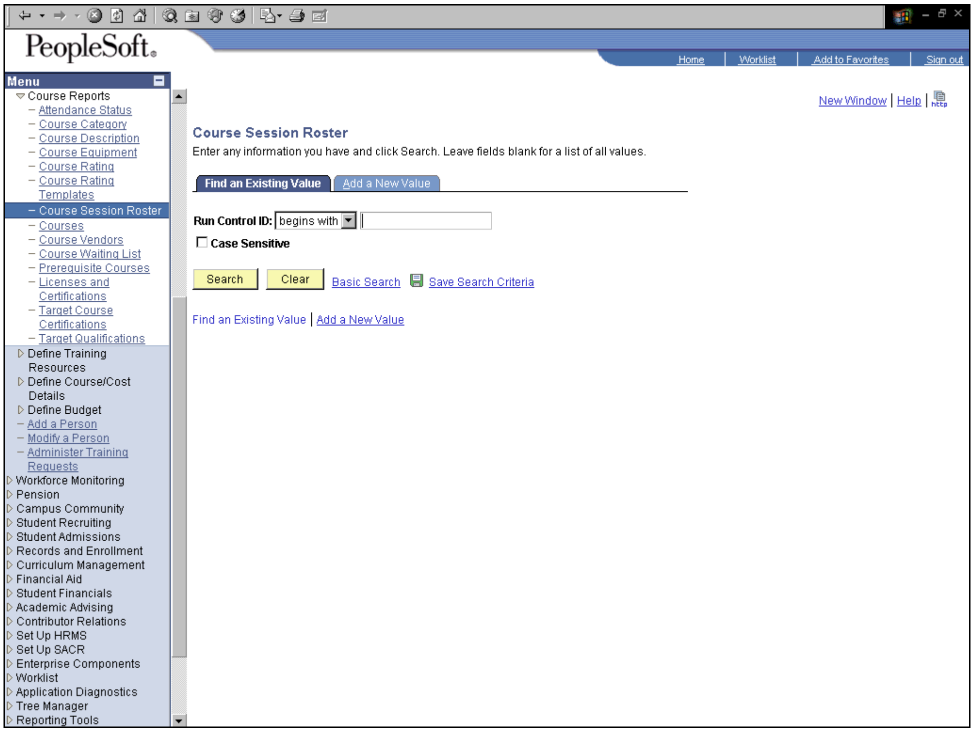
NOTE: Once the **Session Status** has been changed to **Completed,** you will no longer be able to print the **Course Session Roster** for that session.

In this example, we will print the **Course Session Roster** for the **Time Management** course session **0001**.

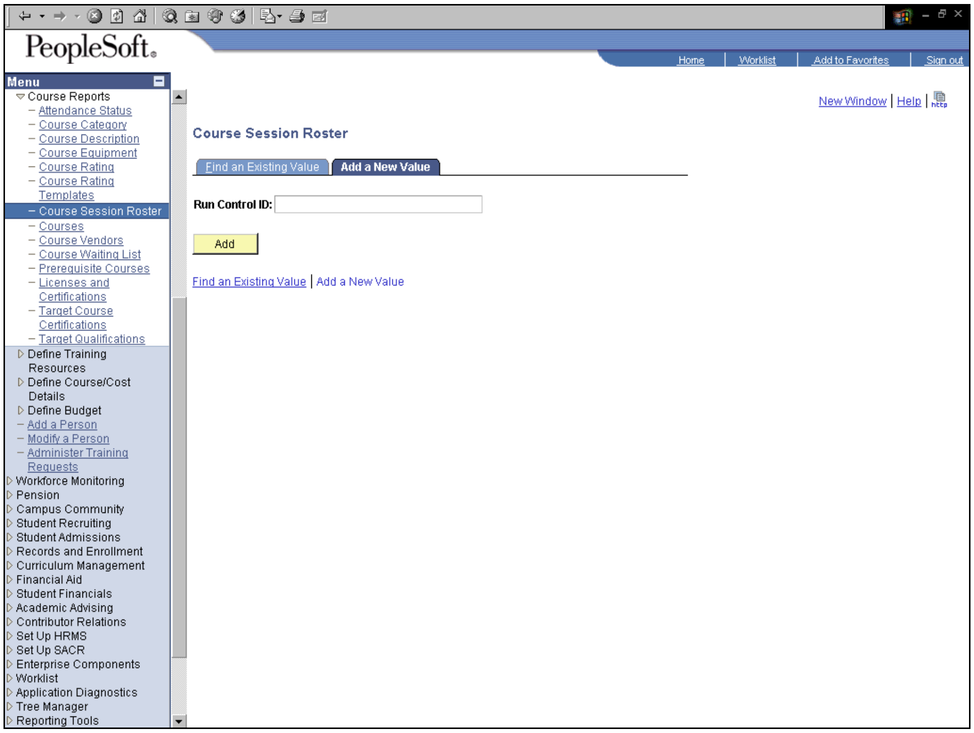
Procedure



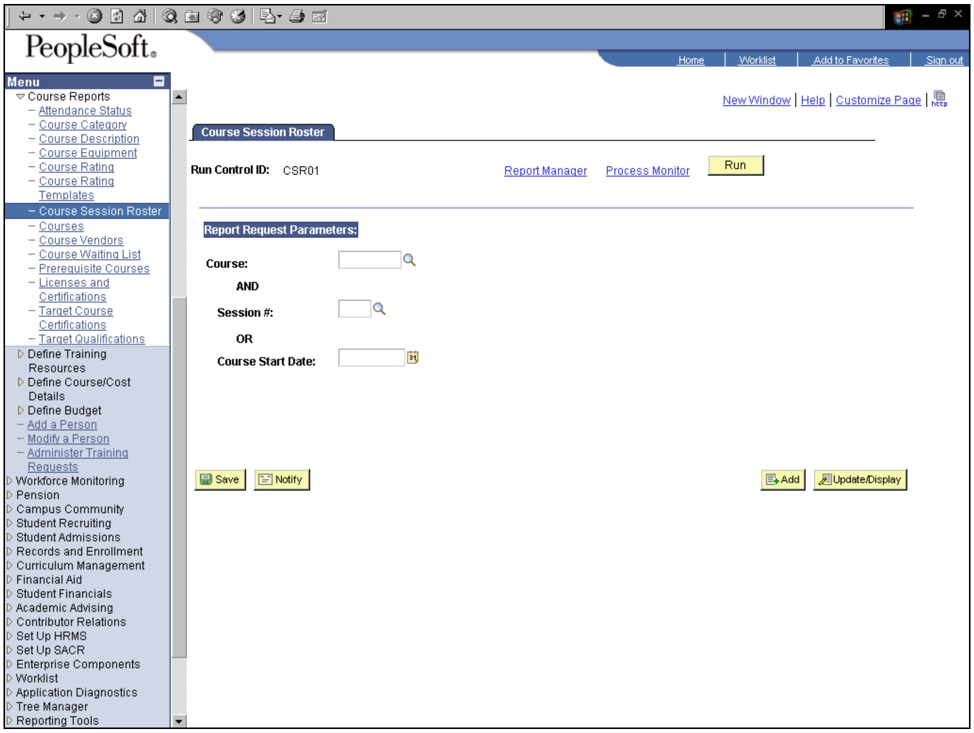
Step	Action
1.	Begin by navigating to the **Course Session Roster** page. Click the **Enterprise Learning** link. ▷ Enterprise Learning
2.	Click the **Course Reports** link.
3.	Click the **Course Session Roster** link.

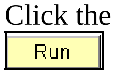


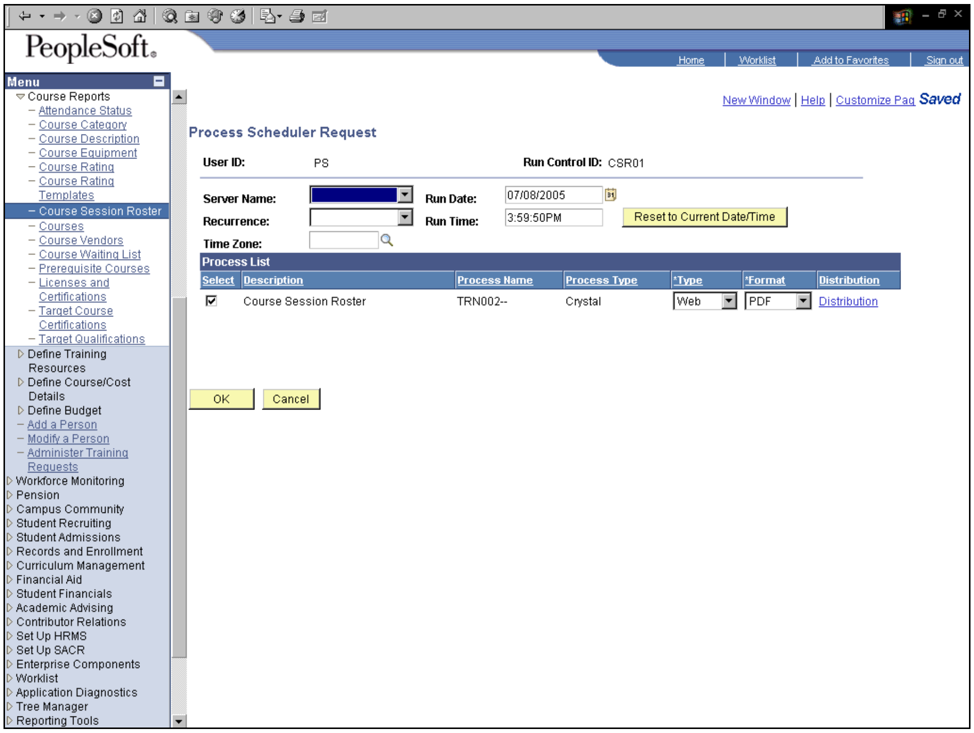
Step	Action
4.	You will need to **Find an Existing** or **Add a New Value** for **Run Control ID.** We are going to **Add a New Value.**

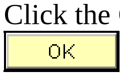


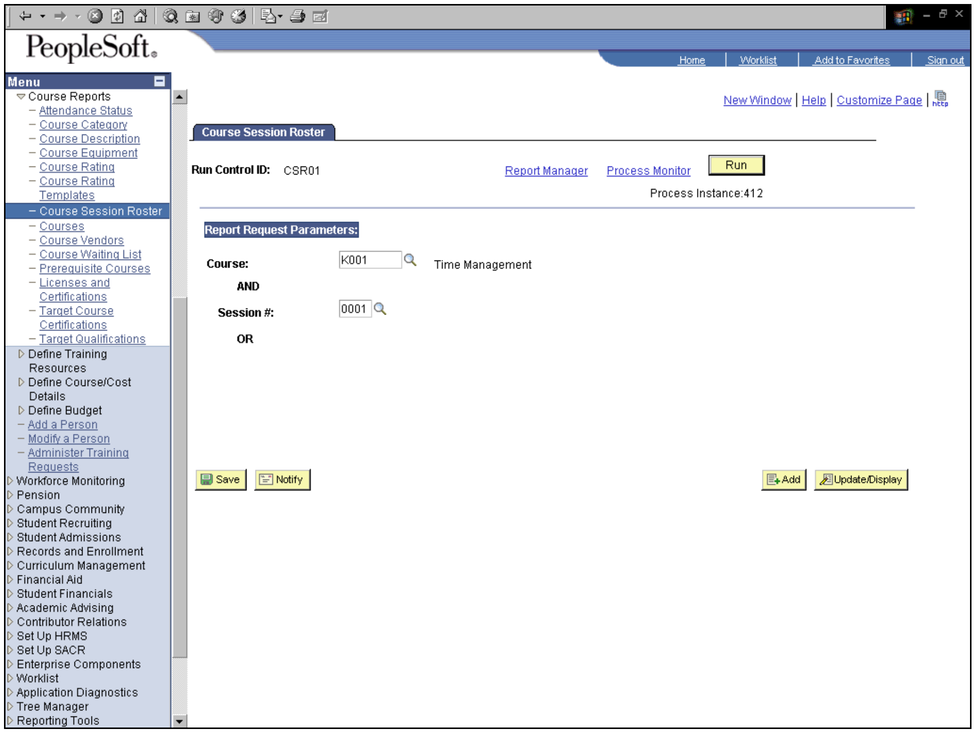
Step	Action
5.	Enter the desired information into the **Run Control ID** field. Example: "**CSR01**".
6.	Click the **Add** button. 
7.	Use the **Course Session Roster** page to define report parameters such as the course name, session number, and session start date.



Step	Action
8.	Enter your **Course** number. Example: "**K001**".
9.	Click in the **Session #** field. 
10.	In the **Session #** field, specify the course session number for which you want to run the report. Alternatively, specify the beginning date of the course in the **Course Start Date** field. Example: **Session #** "**0001**".
11.	Click the **Run** button. 
12.	Use the **Process Scheduler Request** page to specify the parameters that are used when running the report.



Step	Action
13.	Select **Web** from the **Type** list. 
14.	Select format **PDF.** 
15.	By clicking **OK,** you will submit the process to create the **Course Session Roster** for this session. Click the **OK** button. 



Step	Action
16.	Notice a process instance number is displayed. This number is used to identify the process. Use the **Process Monitor** link to retrieve the run status for the **Course Session Roster.** Click the **Process Monitor** link. Process Monitor
17.	Use the **Process List** page to check the status of the process and verify that it is successfully completed
18.	Notice that the **Run Status** for the requested job should be **Success** and the **Distribution Status** should be **Posted.** You may need to click the **Refresh** button multiple times to achieve this result.

	Click the **Details** link in the **Details** column. **NOTE:** The last document you sent to process will appear at the top, if there are several entries listed on the page. On the subsequent pages: Click the **View Log/Trace** link. Click the **PDF** document in the **File List.** When the **Course Session Roster** appears on the screen, you can send it to the printer.

Step	Action
19.	You have successfully created a course session roster. **End of Procedure.**

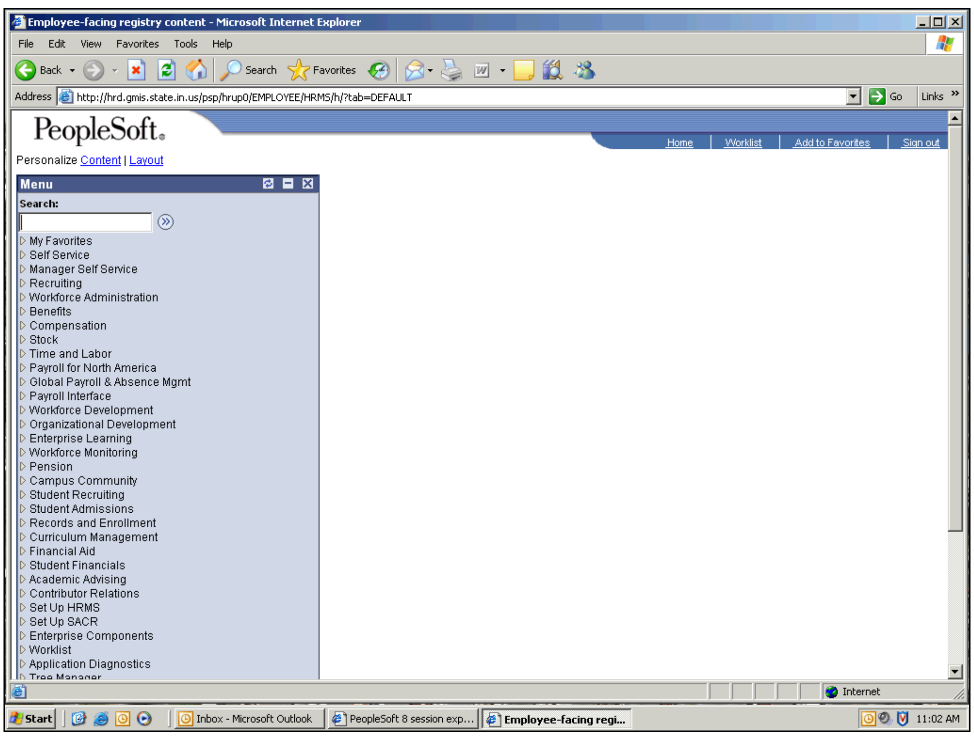
Closing a Session

Closing a Course Session

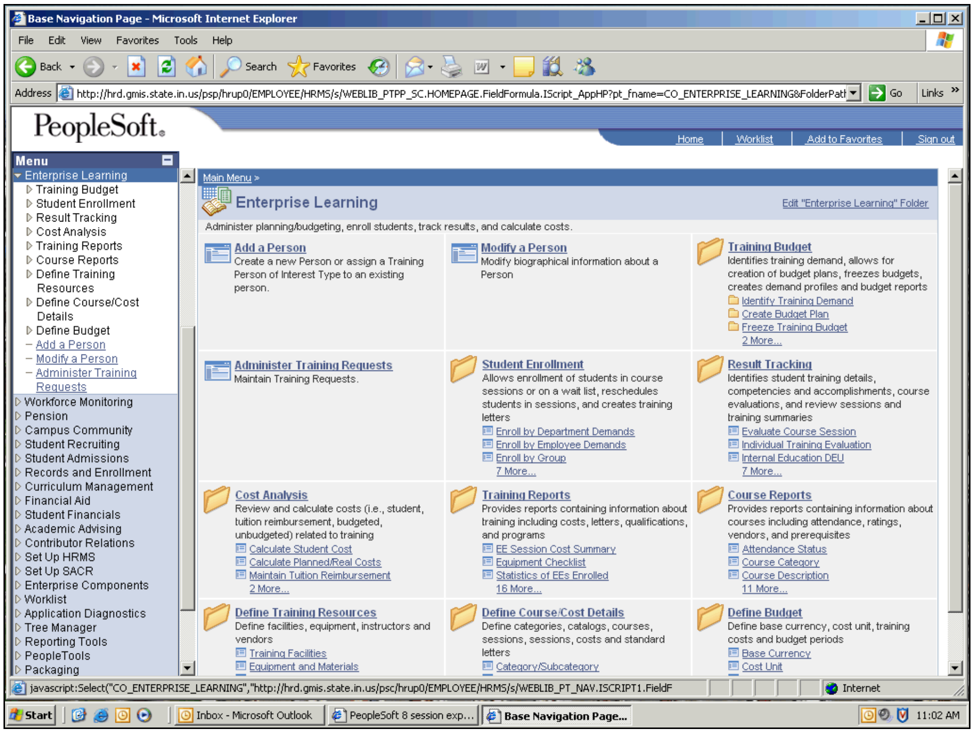
You can set up training sessions for the courses that are designated for internal administration. You specify the session duration, capacity, location, time, instructors, and cost on the **Course Session Profile** page. You can enter, update, or view session status, date, time, and capacity of a course session on this page.

In this topic, the PeopleTools 1 course session 0002 is complete. You need to close this session in PeopleSoft Human Resources.

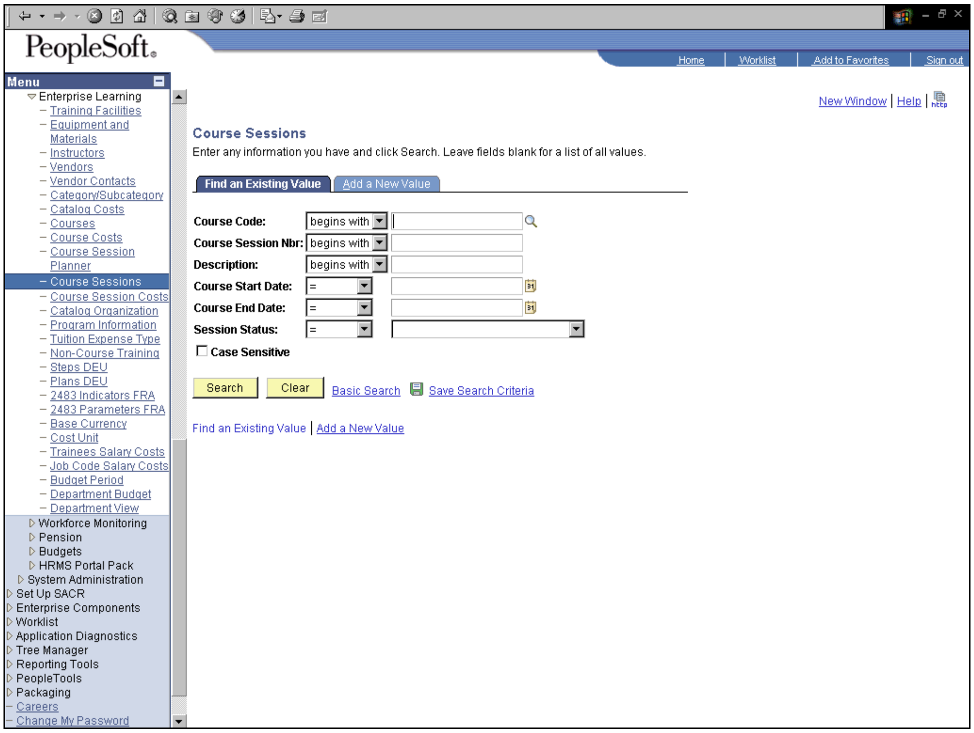
Procedure

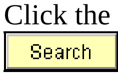


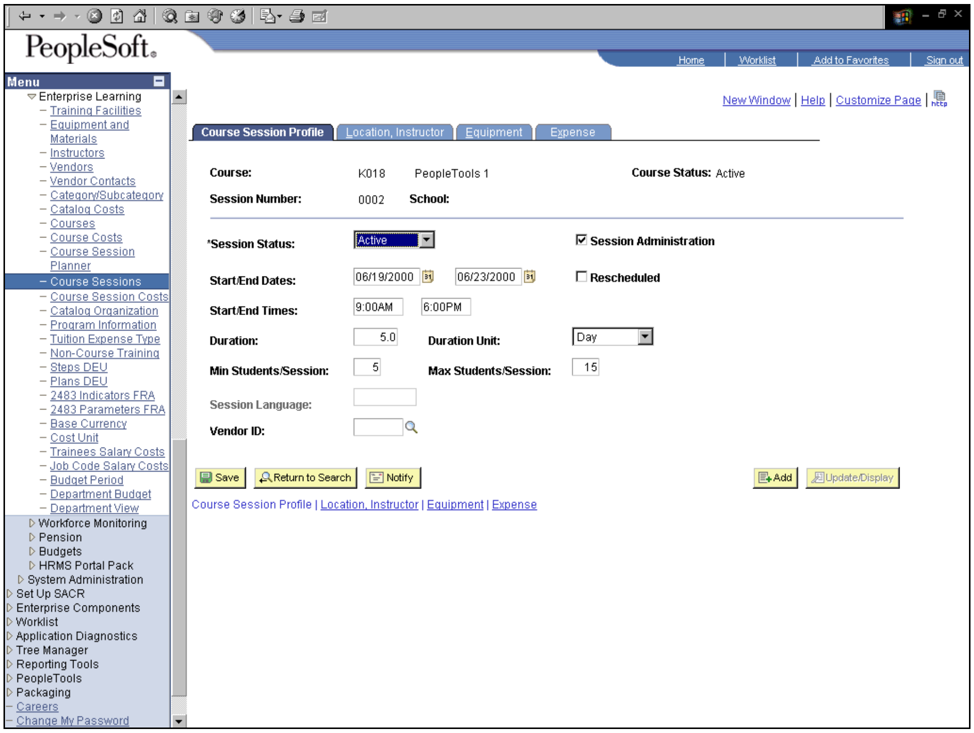
Step	Action
1.	Begin by navigating to the **Course Session Profile** page. Click the **Enterprise Learning** link. 

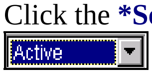


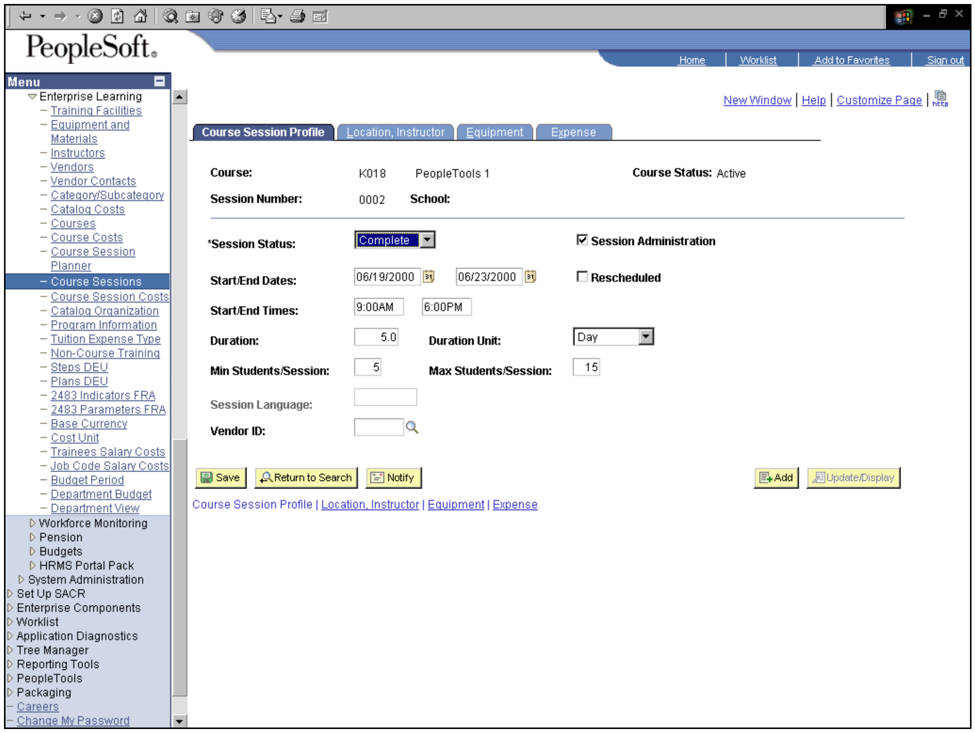
Step	Action
2.	Click the **Define Course/Cost Details** button.
3.	Click the **Course Sessions** button. 



Step	Action
4.	Enter the desired information into the **Course Code** field. Example: "**K018**".
5.	Click in the **Course Session Nbr** field.
6.	Enter the desired information into the **Course Session Nbr** field. Example: "**0002**".
7.	Click the **Search** button. 
8.	Use the **Course Session Profile** page to enter, update, or view session status, dates, times, and student capacity.



Step	Action
9.	Use the **Session Status** field to specify the course status, such as Active, Canceled, or Complete. Click the ***Session Status** list. 
10.	Click an entry in the list. 

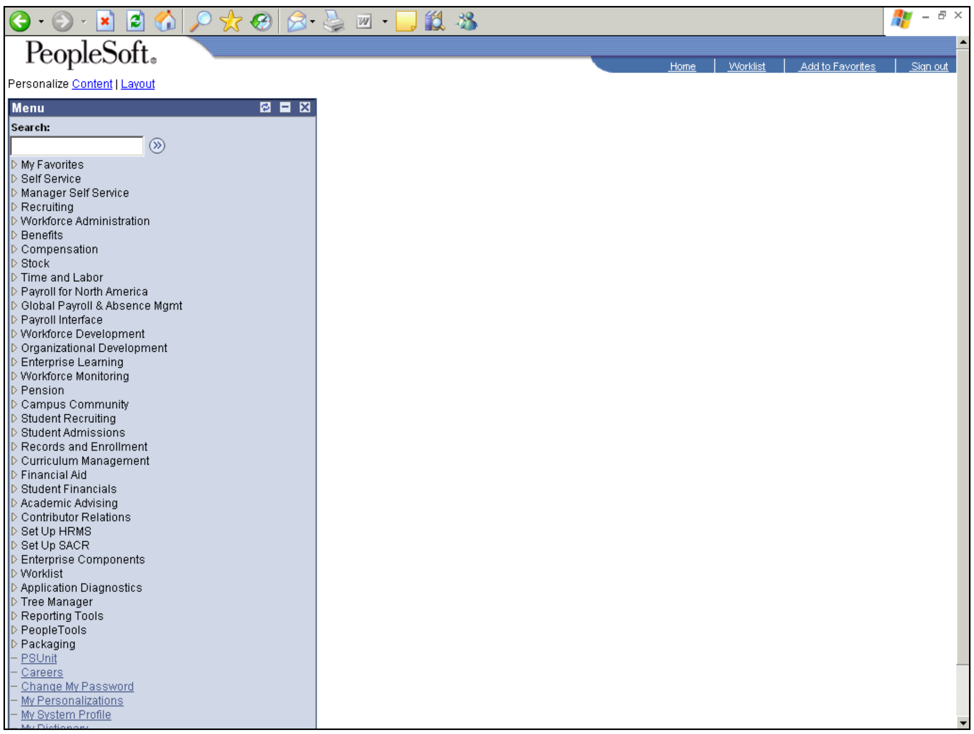


Step	Action
11.	Click the **Save** button. 
12.	You have successfully closed a course session. **End of Procedure.**

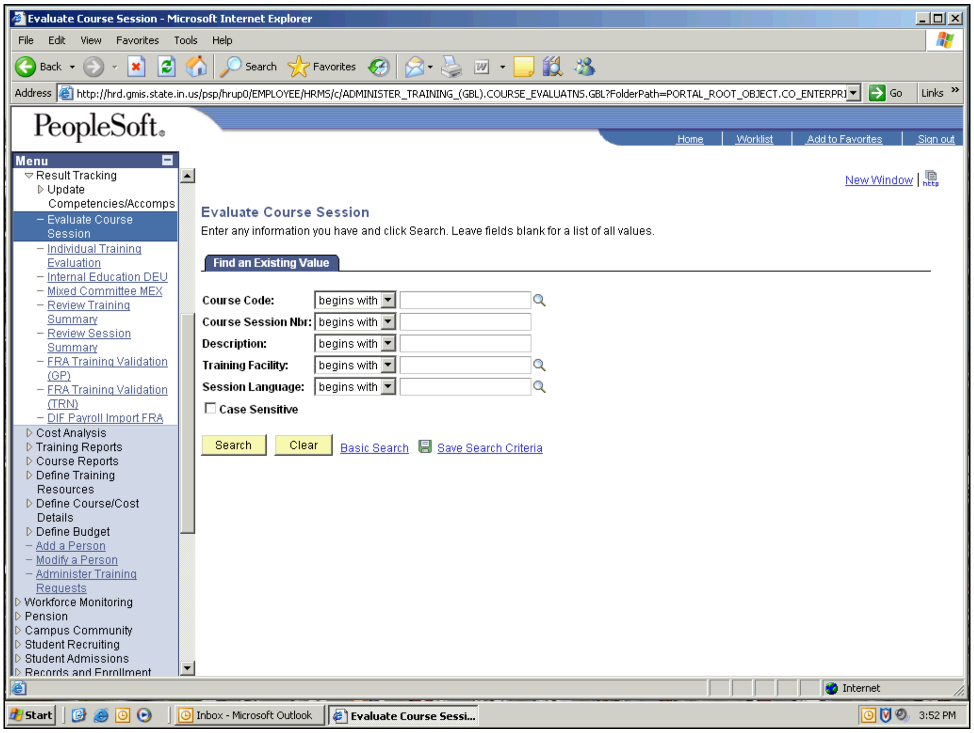
Evaluate a Course Session

Procedure

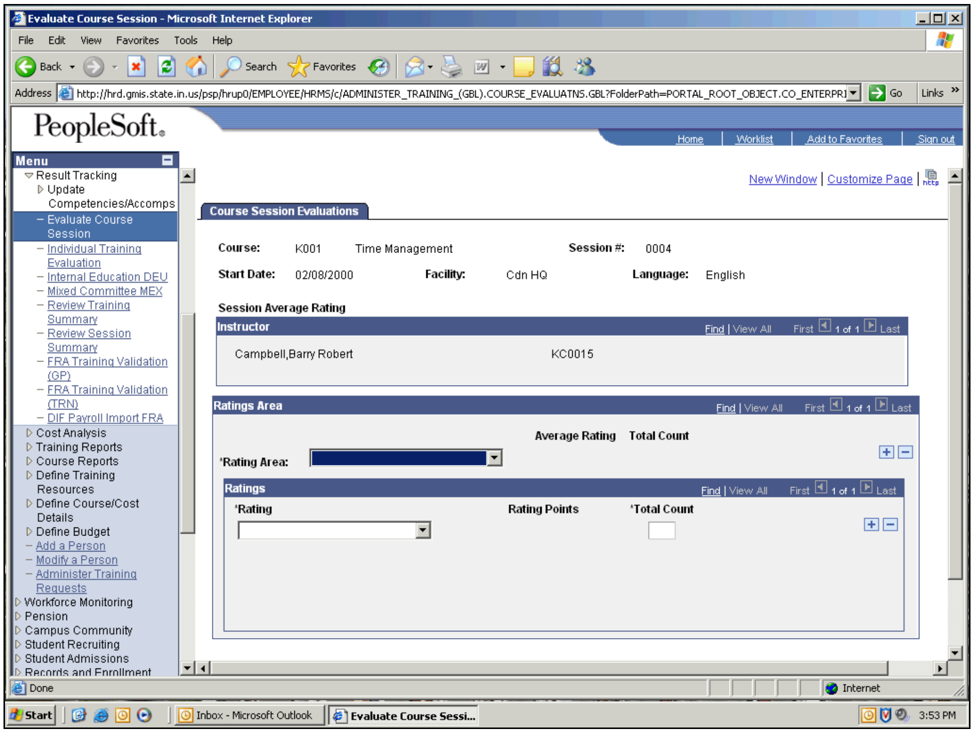
Use the **Evaluate Course Session** page to record student feedback on course sessions so that you know what areas need improvement. You can track course ratings for areas such as training facilities, instructors, course content, materials, and presentation. You can also review session statistics, including the number of responses per rating, average ratings, and the overall average for the session. Ratings can be entered only after you've marked the session **"Completed".**

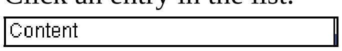
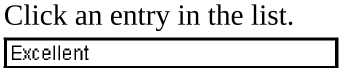


Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning
2.	Click the **Result Tracking** link. ▷ Result Tracking
3.	Click the **Evaluate Course Session** link.



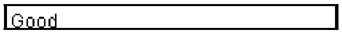
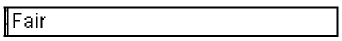
Step	Action
4.	Enter the desired information into the **Course Code** field. Example: "**K001**".
5.	Enter the desired information into the **Course Session Nbr** field. Example: "**0004**".
6.	Click the **Search (Alt+1)** button. Search



Step	Action
7.	In the **Ratings Area** you will need to follow the **Standard Rating Form** format and add rows of data to capture the correct information. The five areas are **Content, Facility, Instructors, Materials**, and **Presentation.** **Important**: Always remember to click the Plus Sign **(+)** before entering the ratings for your next area. Click the ***Rating Area** list. 
8.	Click an entry in the list. 
9.	Click the ***Rating** list. 
10.	In the **Rating** field, select the appropriate rating: **Excellent, Good, Fair, or Poor.** Click an entry in the list. 
11.	In the **Total Count Field**, enter the number of students who selected the rating. The system computes the **Rating Points** assigned to each rating. Enter the desired information into the ***Total Count** field. Example: "5".
12.	Click the **Add a new row at row 1 (Alt+7)** button. 

Step	Action
13.	Click the ***Rating** list.
14.	Click an entry in the list. Fair
15.	Enter the desired information into the ***Total Count** field. Example: "**2**".
16.	Once we have completed all the students' ratings for **Content**, add a row to enter the next **Rating Area**. **Important**: Don't forget to click the **Plus Sign (+)** before entering the next **Rating Area**. Click the **Add a new row at row 1 (Alt+7)** button.
17.	Click the ***Rating Area** list.
18.	Click an entry in the list. Facility
19.	Click the ***Rating** list.
20.	Click an entry in the list. Excellent
21.	Enter the desired information into the ***Total Count** field. Example: "**4**".
22.	Click the **Add a new row at row 1 (Alt+7)** button.
23.	Click the ***Rating** list.
24.	Click an entry in the list. Good
25.	Enter the desired information into the ***Total Count** field. Example: "**2**".
26.	Click the **Add a new row at row 1 (Alt+7)** button.
27.	Click the ***Rating** list.
28.	Click an entry in the list. Fair
29.	Enter the desired information into the ***Total Count** field. Example: "**1**".
30.	Click the **Add a new row at row 1 (Alt+7)** button.

Step	Action
31.	Click the ***Rating Area** list.
32.	Click an entry in the list. Instructors
33.	Click the ***Rating** list.
34.	Click an entry in the list. Excellent
35.	Enter the desired information into the ***Total Count** field. Example: "**7**".
36.	Click the **Add a new row at row 1 (Alt+7)** button.
37.	Click the ***Rating Area** list.
38.	Click an entry in the list. Materials
39.	Click the ***Rating** list.
40.	Click an entry in the list. Good
41.	Enter the desired information into the ***Total Count** field. Example: "**6**".
42.	Click the **Add a new row at row 1 (Alt+7)** button.
43.	Click the ***Rating** list.
44.	Click an entry in the list. Fair
45.	Enter the desired information into the ***Total Count** field. Example: "**1**".
46.	Click the **Add a new row at row 1 (Alt+7)** button.
47.	Click the ***Rating Area** list.
48.	Click an entry in the list. Presentation
49.	Click the ***Rating** list.
50.	Click an entry in the list. Excellent
51.	Enter the desired information into the ***Total Count** field. Example: "**5**".

Step	Action
52.	Click the **Add a new row at row 1 (Alt+7)** button. 
53.	Click the ***Rating** list. 
54.	Click an entry in the list. 
55.	Enter the desired information into the ***Total Count** field. Example: "**1**".
56.	Click the **Add a new row at row 1 (Alt+7)** button. 
57.	Click the ***Rating** list. 
58.	Click an entry in the list. 
59.	Enter the desired information into the ***Total Count** field. Example: "**1**".
60.	Click the scrollbar.
61.	Once you have entered all the ratings save your information. After you click the save button the system will calculate the overall session rating average. Click the **Save (Alt+1)** button. 
62.	Click the scrollbar.
63.	Notice the **Session Average Rating** field has updated. You can also view individual **Rating Areas** by using the **Arrow** or **View All** keys located in the **Ratings Area**.
64.	**End of Procedure.**

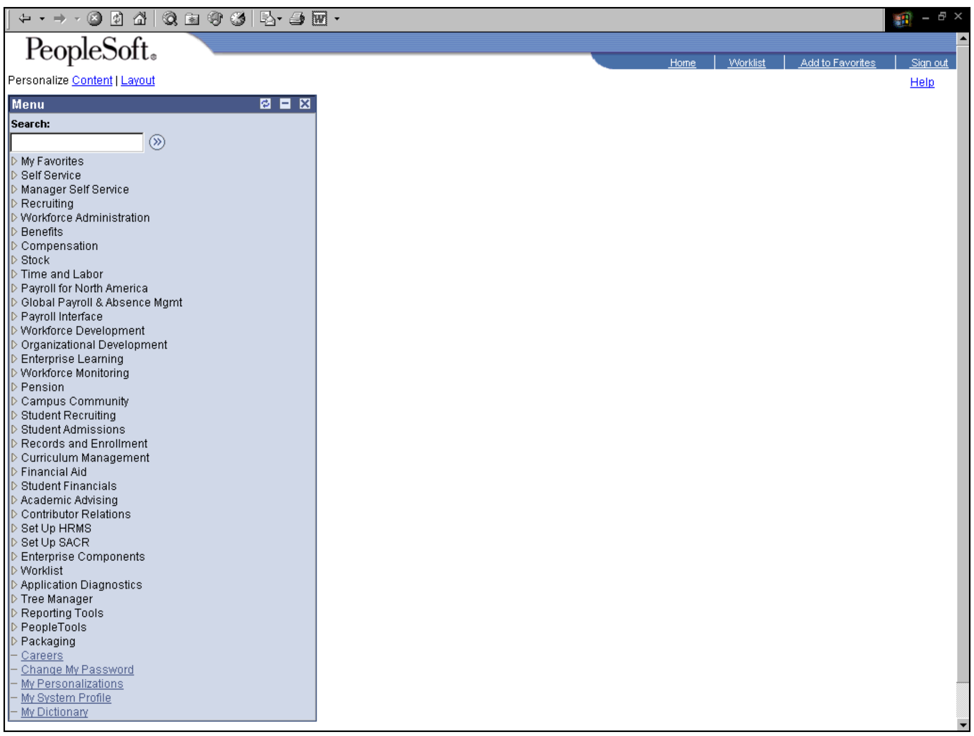
Reviewing Training Records

Viewing Student Training Summary

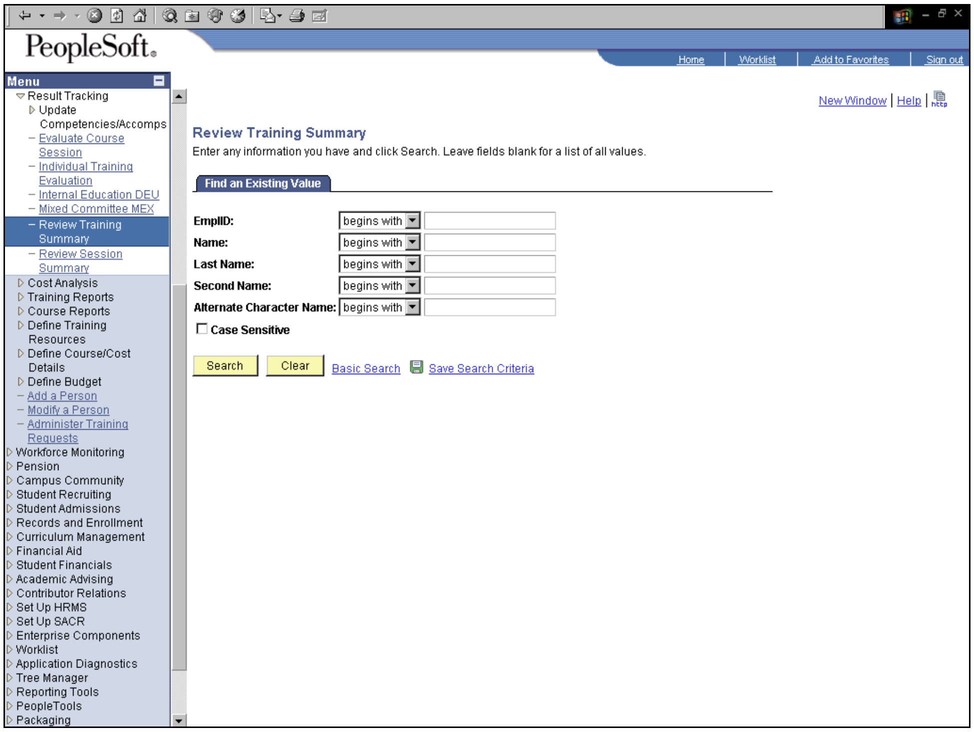
Use the **Review Training Summary** page to view the entire training history for an employee. This information may also be saved to a spreadsheet.

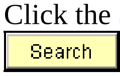
In this example, Martina Griffith's manager wants to know whether she has passed the Performance Management course, which can be done through the **Review Training Summary.**

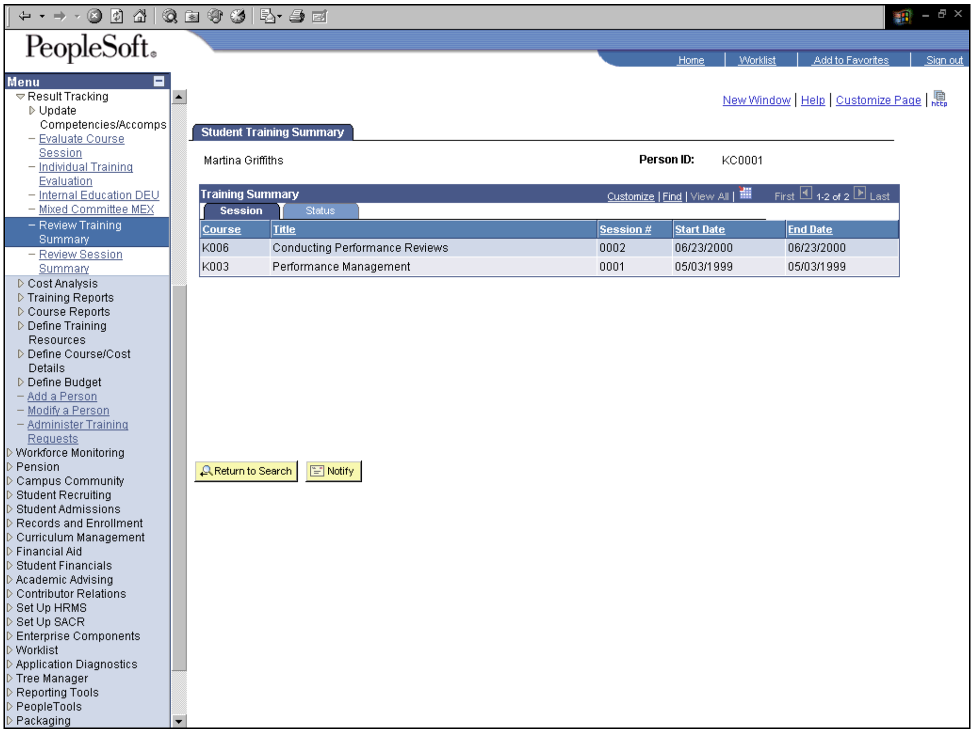
Procedure



Step	Action
1.	Begin by navigating to the **Student Training Summary** page. Click the **Enterprise Learning** link. ▷ Enterprise Learning
2.	Click the **Result Tracking** link.
3.	Click the **Review Training Summary** link.



Step	Action
4.	Enter the desired information into the **EmplID** field. Example: "**KC0001**".
5.	Click the **Search** button. 
6.	Use the **Student Training Summary** page to view the summary of a student's training history.



Step	Action
7.	Click the **Status** tab. 
8.	View a student's training history to determine whether the student has completed or passed a course. Notice that Martina has completed the Performance Management course with grade **P**, indicating Passed.
9.	In summary, you view an employee's training summary information to identify the courses that the employee has taken. **End of Procedure.**

Appendix

Appendix A - Adding a Course Session

1.	Begin by navigating to the **Course Session Profile** page. Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Define Course/Cost Details** link.
3.	Click the **Course Sessions** link.
4.	Click the **Add a New Value** tab.
5.	Enter the desired information into the **Course Code** field. Enter a valid value e.g. "**BSK001**". If you do not know the course code, click on the magnifying glass to lookup the course codes.
6.	Click the **Add** button. **IMPORTANT:** Leave the Course Session Number Blank. The system will assign a sequential number when you save the record. Add
7.	Use the **Course Session Profile** page to enter, update, or view a session status, date, time, and capacity.
8.	Specify the session status, such as Active, Canceled, or Complete in the **Session Status** field. To create a new session, accept the default status of **Active** for the **Session Status** field.
9.	Enter the desired information into the **Start Date** field. Enter a valid value e.g. "**02/17/2003**".
10.	Press **[Tab]**. 02/17/2003
11.	Enter the desired information into the **End Date** field. Enter a valid value e.g. "**02/17/2004**". (**Note:** The fact that the class start/end dates are not the same year appears to be a typo in the tutorial.)
12.	Press **[Tab].** 02/17/2004
13.	Enter the desired information into the **Start Time** field. Enter a valid value e.g. "**0800**".
14.	Press **[Tab].** 0800

15.	Enter the desired information into the **End Time** field. Enter a valid value e.g. "**1700**".
16.	Click the **Location, Instructor** tab.
17.	Use the **Location, Instructor** page to enter, update, or view information regarding the course session at the training facility.
18.	Specify a training facility code for this session in the **Facility** field. Enter the desired information into the **Facility** field. Enter a valid value e.g. "**BZ001**".
19.	Click the **Save** button. Save
20.	Notice that the session number has changed from **0000** to **0001**. This indicates that a session has been added to the Presentation Skills course. It was automatically assigned a number. In this case **0001**.
21.	You have successfully added a session for the Presentation Skills course. **End of Procedure.**

Appendix B - Adding an Instructor

1.	Begin by navigating to the **Instructor Profile** page. Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Instructors** link under **Define Training Resources.** Instructors
3.	Either **Find an Existing Value** (Person is already designated as an instructor in PeopleSoft), or **Add a New Value** (Designate a new person as an instructor.) We will designate a new instructor. Click the **Add a New Value** tab.
4.	Enter the desired information into the **Instructor ID** field. Enter a valid value e.g. "**KR0028**".
5.	Click the **Add** button. Add
6.	Click the **Qualification** tab.
7.	Use the **Qualification** page to add, update, or display the courses that the instructor is qualified to teach.
8.	In the **Course Code** field, specify a course code from the list of courses that the instructor will teach. Enter the desired information into the ***Course Code** field. Enter a valid value e.g. "**K005**".
9.	To list an additional course the instructor is qualified to teach, you would click the plus (+) key. This would give you another row, where you can add an additional **Course Code.**

10.	Click the **Save** button. Save
11.	You have successfully added Luis Duarte as an instructor. **End of Procedure.**

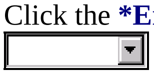
Appendix C - Add a Person (External Trainee)

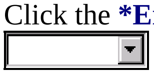
1.	Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Add a Person** button.
3.	Click the **Person of Interest Type** list.
4.	Select "External Trainee." External Trainee
5.	Click the **Add the Person** button. Add the Person
6.	Click the **Add** button. Add
7.	For the effective date, enter the first day this person began their working relationship with your agency. 12/21/2006
8.	Click the ***Format Type** list.
9.	Select English in the drop down list. English
10.	Click the **Add Name** link. Add Name
11.	Enter the desired information into the **First Name** field. Enter a valid value e.g. "**John**".
12.	Enter the desired information into the **Last Name** field. Enter a valid value e.g. "**Student**".
13.	Click the **OK** button. OK
14.	Enter the desired information into the **Date of Birth** field. Enter a valid value e.g. "**010182**".
15.	Leave gender as "Unknown" for External Trainee. Unknown
16.	Click the ***Marital Status** list. Single

17.	Select "Unknown" for Marital Status for External Trainee.
18.	Click the ***National ID Type** list. Social Security Number
19.	Select "Driver's License Number" for External Trainee. Driver's License Number
20.	Enter the desired information into the **National ID** field. Enter a valid value e.g. "**2156-89-6532**".
21.	Click the **Contact Information** tab. Contact Information
22.	Click the **Add Address Detail** link. Add Address Detail
23.	Click the **Add Address** link. Add Address
24.	Enter the desired information into the **Address 1** field. Enter a valid value e.g. "**123 Student Blvd**".
25.	Enter the desired information into the **City** field. Enter a valid value e.g. "**Indianapolis**".
26.	Enter the desired information into the **State** field. Enter a valid value e.g. "**IN**".
27.	Press **[Tab]**.
28.	Enter the desired information into the **Postal** field. Enter a valid value e.g. "**46215**".
29.	Enter the desired information into the **County** field. Enter a valid value e.g. "**Marion**".
30.	Click the **OK** button. OK
31.	Click the **OK** button. OK
32.	Choose a **Phone Type** in the drop down list.
33.	Enter the desired information into the **Telephone** field. Enter a valid value e.g. "**3178653265**".
34.	Press **[Tab]**.
35.	Click the **Preferred** option.
36.	Choose an **Email Type** from the drop down list.
37.	Enter the desired information into the ***Email Address** field. Enter a valid value e.g. "**jstudent@myhome.com**".
38.	Click the **Preferred** option.

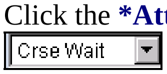
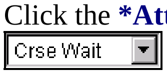
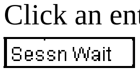
39.	Click the **Organizational Relationships** tab. Organizational Relationships
40.	Click the **Add the Relationship** button. Add the Relationship
41.	Click the **Return** button. This screen will display all values matched by first name, last name, and National ID number. This search is utilized to determine if the person being added already has a record in the PeopleSoft system. If there is a match for the person being added, click "Carry ID" to utilize the PeopleSoft ID number already assigned to this person. If no match exists, click on Return. If no match exists. when you click on Return a PeopleSoft Empl ID# will be assigned automatically by the system. Return
42.	Click the **OK** button. OK
43.	Under Security Access Type, choose **Business Unit**.
44.	Enter the Business Unit into the **Value 1** field. Enter a valid value e.g. "**00070**".
45.	Press **[Tab]**.
46.	Click the **Add a new row at row 1 (Alt+7)** button.
47.	In the newly added row under Security Access Type, choose **Location**.
48.	Press **[Tab]**.
49.	Click the **Look up Value 2 (Alt+5)** button.
50.	Choose **Description** from the drop down list. Location Code
51.	Enter the desired information into the **begins with** field. Enter a valid value e.g. "**state**".
52.	Click the **Look Up** button. Look Up
53.	Choose **State Personnel Department** from the Search Results list. State Personnel Department
54.	Click the **OK** button. OK
55.	Click the **OK** button. OK
56.	**End of Procedure.**

Appendix D - Enrolling Students Individually

1.	Begin by navigating to the **Course Session Enrollment** page. Click the **Enterprise Learning** link. 
2.	Click the **Student Enrollment** link.
3.	Click the **Enroll Individually** link.
4.	Enter the desired information into the **Course Code** field. Enter a valid value e.g. "**BSK001**".
5.	Click in the **Course Session Nbr** field. 
6.	Enter the desired information into the **Course Session Nbr** field. Enter a valid value e.g. "**0001**".
7.	Click the **Search** button. 
8.	Use the **Course Session Enrollment** page to enroll students. **CAUTION:** As you select each student for enrollment, always double-check the Business Unit field and verify that it is the correct employee. Name searches sometimes display more than one individual with the same name.
9.	Enter the desired information into the **EmplID** field. Enter a valid value e.g. "**KR0040**".
10.	Specify the student enrollment status, such as Enrolled or Sessn Wait in the **Enrollment/Attendance** field. Click the ***Enrollment/Attendance** list. 
11.	Select **Enrolled**. 
12.	The **Status Date** field uses the current system date by default. Accept the default date for this field.
13.	Specify the reason for training in the **Training Reason** field. Click the **Training Reason** list. 
14.	Click an entry in the list. Always select **Skill Enhancement.** 
15.	Leave the **Prerequisites Met** option turned off. After you have finished all enrollments, you may use **Prerequisite Checking** (above) to verify that your students' course requirements have been met. Prerequisites, if used, would need to be set up when the Course is entered into the system.

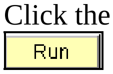
16.	You may use the **Prerequisite Checking** button to search the Student Training records listed on the **Session Enrollment** page and determine if each student has completed and passed the prerequisite courses. If so, PeopleSoft populates the **Prerequisites Met** check box for each student who meets the criteria. If a student is lacking the necessary courses, a process for notifying students of discrepancies may be developed. Also, any enrolled status existing for students who do not meet the prerequisites may be manually changed.
17.	Use the **Letter Code** field to generate a form letter. The letter code defaults to CON, indicating Confirmed. For this exercise, accept the default letter code value. **IMPORTANT!!** The system does not currently support the generation of letters. At this time, you must have an alternative method of notifying students.
18.	We will now add another student. Click the **Add Row** button. 
19.	Enter the desired information into the **EmplID** field. Enter a valid value e.g. "**KR0041**".
20.	Click the ***Enrollment/Attendance** list. 
21.	Click an entry in the list. Select **Enrolled.** 
22.	Click the **Training Reason** list. 
23.	Click an entry in the list. Select **Skill Enhancement.** 
24.	You have enrolled two employees in Presentation Skills course session 0001. If you enroll more than the maximum number of employees allowed in the session, the PeopleSoft application issues a warning message when you save the page.
25.	Your enrollment(s) are completed. Click the **Save** button. 
26.	You have successfully enrolled individual students into a course session. **End of Procedure.**

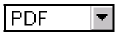
Appendix E - Creating a Wait List

1.	Begin by navigating to the **Course Wait List** page. Click the **Enterprise Learning** link. 
2.	Click the **Student Enrollment** link.
3.	Click the **Create/Update Course Wait List** link.
4.	Enter the desired information into the **Course Code** field. Enter a valid value e.g. "**K005**".
5.	Click the **Search** button. 
6.	Use the **Course Wait List** page to add employees and non-employees to wait lists and assign the enrollment status. For this exercise, add two employees to the wait list. To add them to the wait list, specify their IDs in the **EmplID** field.
7.	Enter the desired information into the **EmplID** field. Enter a valid value e.g. "**KU0097**".
8.	Assign a wait list status to the employee in the **Attendance** field. The PeopleSoft application provides a course wait list and a session wait list. Use both of these statuses in the processing logic when enrolling students from a wait list to a session. Click the ***Attendance** list. 
9.	Click an entry in the list. 
10.	The system populates a letter code from the **Standard Letter** table according to the student's wait list status. The system also populates the wait list date based on the current date. The PeopleSoft application uses this date to enroll students from the oldest date to the most recent date. You can override this date if the student requested for enrollment in the course on a different date. For this example, accept the default wait list date in the **Waitlst Dt** field.
11.	Click in the **Session #** field. 
12.	If you assign a session wait list status to a student, specify the session number from the list of Active sessions in the **Session #** field. Enter the desired information into the **Session #** field. Enter a valid value e.g. "**0072**".
13.	Click the **Add Row** button. 
14.	Enter the desired information into the **EmplID** field. Enter a valid value e.g. "**KU0098**".
15.	Click the ***Attendance** list. 
16.	Click an entry in the list. 

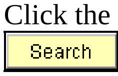
17.	Click in the **Session #** field.
18.	Enter the desired information into the **Session #** field. Enter a valid value e.g. "**0072**".
19.	Click the **Save** button. 
20.	You have successfully created a wait list. **End of Procedure.**

Appendix F - Creating a Course Session Roster

1.	Begin by navigating to the **Course Session Roster** page. Click the **Enterprise Learning** link. 
2.	Click the **Course Reports** link.
3.	Click the **Course Session Roster** link.
4.	You will need to **Find an Existing** or **Add a New Value** for **Run Control ID.** We are going to **Add a New Value.**
5.	Enter the desired information into the **Run Control ID** field. Enter a valid value e.g. "**CSR01**".
6.	Click the **Add** button. 
7.	Use the **Course Session Roster** page to define report parameters such as the course name, session number, and session start date.
8.	Enter your **Course** number. Enter a valid value e.g. "**K001**".
9.	Click in the **Session #** field.
10.	In the **Session #** field, specify the course session number for which you want to run the report. Alternatively, specify the beginning date of the course in the **Course Start Date** field. Enter **Session #** a valid value e.g. "**0001**".
11.	Click the **Run** button. 
12.	Use the **Process Scheduler Request** page to specify the parameters that are used when running the report.
13.	Select **Web** from the **Type** list. 

14.	Select format **PDF.** 
15.	By clicking **OK,** you will submit the process to create the **Course Session Roster** for this session. Click the **OK** button. 
16.	Notice a process instance number is displayed. This number is used to identify the process. Use the **Process Monitor** link to retrieve the run status for the **Course Session Roster.** Click the **Process Monitor** link. 
17.	Use the **Process List** page to check the status of the process and verify that it is successfully completed
18.	Notice that the **Run Status** for the requested job should be **Success** and the **Distribution Status** should be **Posted.** You may need to click the **Refresh** button multiple times to achieve this result.
19.	You have successfully created a course session roster. **End of Procedure.**

Appendix G - Closing a Course Session

1.	Begin by navigating to the **Course Session Profile** page. Click the **Enterprise Learning** link. 
2.	Click the **Define Course/Cost Details** button.
3.	Click the **Course Sessions** button. 
4.	Enter the desired information into the **Course Code** field. Enter a valid value e.g. "**K018**".
5.	Click in the **Course Session Nbr** field.
6.	Enter the desired information into the **Course Session Nbr** field. Enter a valid value e.g. "**0002**".
7.	Click the **Search** button. 

8.	Use the **Course Session Profile** page to enter, update, or view session status, dates, times, and student capacity.
9.	Use the **Session Status** field to specify the course status, such as Active, Canceled, or Complete. Click the ***Session Status** list. Active
10.	Click an entry in the list. Complete
11.	Click the **Save** button. Save
12.	You have successfully closed a course session. **End of Procedure.**

Appendix H - Evaluate a Course Session

1.	Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Result Tracking** link. Result Tracking
3.	Click the **Evaluate Course Session** link.
4.	Enter the desired information into the **Course Code** field. Enter a valid value e.g. "**K001**".
5.	Enter the desired information into the **Course Session Nbr** field. Enter a valid value e.g. "**0004**".
6.	Click the **Search (Alt+1)** button. Search
7.	In the **Ratings Area** you will need to follow the **Standard Rating Form** format and add rows of data to capture the correct information. The five areas are **Content, Facility, Instructors, Materials**, and **Presentation.** **Important**: Always remember to click the Plus Sign **(+)** before entering the ratings for your next area. Click the ***Rating Area** list.
8.	Click an entry in the list. Content
9.	Click the ***Rating** list.

10.	In the **Rating** field, select the appropriate rating: **Excellent, Good, Fair, or Poor.** Click an entry in the list. Excellent
11.	In the **Total Count Field**, enter the number of students who selected the rating. The system computes the **Rating Points** assigned to each rating. Enter the desired information into the ***Total Count** field. Enter a valid value e.g. "**5**".
12.	Click the **Add a new row at row 1 (Alt+7)** button.
13.	Click the ***Rating** list.
14.	Click an entry in the list. Fair
15.	Enter the desired information into the ***Total Count** field. Enter a valid value e.g. "**2**".
16.	Once we have completed all the students' ratings for **Content**, add a row to enter the next **Rating Area**. **Important**: Don't forget to click the **Plus Sign (+)** before entering the next **Rating Area**. Click the **Add a new row at row 1 (Alt+7)** button.
17.	Click the ***Rating Area** list.
18.	Click an entry in the list. Facility
19.	Click the ***Rating** list.
20.	Click an entry in the list. Excellent
21.	Enter the desired information into the ***Total Count** field. Enter a valid value e.g. "**4**".
22.	Click the **Add a new row at row 1 (Alt+7)** button.
23.	Click the ***Rating** list.
24.	Click an entry in the list. Good
25.	Enter the desired information into the ***Total Count** field. Enter a valid value e.g. "**2**".
26.	Click the **Add a new row at row 1 (Alt+7)** button.
27.	Click the ***Rating** list.

28.	Click an entry in the list. Fair
29.	Enter the desired information into the ***Total Count** field. Enter a valid value e.g. "**1**".
30.	Click the **Add a new row at row 1 (Alt+7)** button.
31.	Click the ***Rating Area** list.
32.	Click an entry in the list. Instructors
33.	Click the ***Rating** list.
34.	Click an entry in the list. Excellent
35.	Enter the desired information into the ***Total Count** field. Enter a valid value e.g. "**7**".
36.	Click the **Add a new row at row 1 (Alt+7)** button.
37.	Click the ***Rating Area** list.
38.	Click an entry in the list. Materials
39.	Click the ***Rating** list.
40.	Click an entry in the list. Good
41.	Enter the desired information into the ***Total Count** field. Enter a valid value e.g. "**6**".
42.	Click the **Add a new row at row 1 (Alt+7)** button.
43.	Click the ***Rating** list.
44.	Click an entry in the list. Fair
45.	Enter the desired information into the ***Total Count** field. Enter a valid value e.g. "**1**".
46.	Click the **Add a new row at row 1 (Alt+7)** button.
47.	Click the ***Rating Area** list.
48.	Click an entry in the list. Presentation
49.	Click the ***Rating** list.

50.	Click an entry in the list. Excellent
51.	Enter the desired information into the ***Total Count** field. Enter a valid value e.g. "**5**".
52.	Click the **Add a new row at row 1 (Alt+7)** button.
53.	Click the ***Rating** list.
54.	Click an entry in the list. Good
55.	Enter the desired information into the ***Total Count** field. Enter a valid value e.g. "**1**".
56.	Click the **Add a new row at row 1 (Alt+7)** button.
57.	Click the ***Rating** list.
58.	Click an entry in the list. Fair
59.	Enter the desired information into the ***Total Count** field. Enter a valid value e.g. "**1**".
60.	Click the scrollbar.
61.	Once you have entered all the ratings save your information. After you click the save button the system will calculate the overall session rating average. Click the **Save (Alt+1)** button. Save
62.	Click the scrollbar.
63.	Notice the **Session Average Rating** field has updated. You can also view individual **Rating Areas** by using the **Arrow** or **View All** keys located in the **Ratings Area**.
64.	**End of Procedure.**

Appendix I - Viewing Student Training Summary

1.	Begin by navigating to the **Student Training Summary** page. Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Result Tracking** link.
3.	Click the **Review Training Summary** link.
4.	Enter the desired information into the **EmplID** field. Enter a valid value e.g. "**KC0001**".
5.	Click the **Search** button. Search

6.	Use the **Student Training Summary** page to view the summary of a student's training history.
7.	Click the **Status** tab. 
8.	View a student's training history to determine whether the student has completed or passed a course. Notice that Martina has completed the Performance Management course with grade **P**, indicating Passed.
9.	In summary, you view an employee's training summary information to identify the courses that the employee has taken. **End of Procedure.**